



# The Daily

Statistics Canada

Friday, August 21, 1998

For release at 8:30 a.m.

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## MAJOR RELEASES

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- **Monthly Survey of Manufacturing, June 1998**

Total manufacturing shipments declined 2.9% in June to \$35.6 billion, due to plant closures in the automotive sector. Excluding the motor vehicle and parts industries, shipments increased 0.5% in June.

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- **Livestock estimates, July 1, 1998**

The hog sector continued its long-term expansion, driven by exports to the United States. As of July 1, 1998, farmers had reported record inventories for hogs, while cattle inventories declined.

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*(continued on following page)*

### Postal code conversion file

May 1998

The May 1998 *Postal code conversion file* (PCCF) is now available. This digital file links the six character postal code with the standard 1996 Census geographic areas (such as enumeration areas, census tracts, and census subdivisions). It also locates each postal code by longitude and latitude co-ordinates to support mapping applications. This version of the *Postal code conversion file* is an update to the June 1997 version released last December.

The May 1998 version of the *Postal codes by federal riding* (1996 representation order) file is also available. This product, a subset of the PCCF, provides a link between the six-character postal code and Canada's federal electoral districts (commonly known as federal ridings). By using the postal code as a link, data from administrative files may be organized and/or tabulated by federal riding.

The *Postal code conversion file* (92F0027XDB) and the *Postal codes by federal riding file* (92F0028XDB) are available in ASCII format on diskette or CD-ROM.

For further information on this release, or to order these files, contact the Statistics Canada Regional Reference Centre nearest you.



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## OTHER RELEASES

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## MAJOR RELEASES

### Monthly Survey of Manufacturing

June 1998

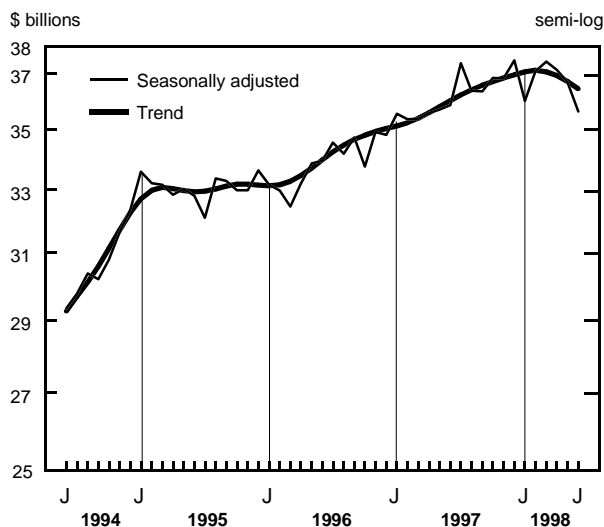
Total manufacturing shipments declined 2.9% in June to \$35.6 billion, due to plant closures in the automotive sector. Excluding the motor vehicle and parts industries, shipments increased 0.5% in June.

Total manufacturing shipments, which were generally on the rise throughout 1996 and 1997, have been adversely affected by two temporary factors in 1998 — the January ice storm, and the General Motors strike in the United States.

Strong increases in both inventories and unfilled orders were observed in June.

Looking ahead, a number of Canadian motor vehicle assembly plants and domestic parts manufacturers remained closed in July as the General Motors strike in the United States remained unresolved until month's end.

Total shipments down in June



#### Note to readers

Seasonally adjusted data between January 1997 and May 1998 have been revised with this release. This is done annually to allow the sum of the monthly seasonally adjusted data to be set equal to the sum of the raw data for the previous calendar year.

Unfilled orders are a stock of orders, which will contribute to future shipments, assuming that orders are not cancelled.

New orders represent orders received whether shipped in the current month or not. They are measured as the sum of shipments for the current month (i.e., 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 inappropriate 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.

Not all orders will be translated into Canadian factory shipments. This is because portions of large contracts can be subcontracted out to other countries.

for part of June as a result of the General Motors strike in the United States

#### Other shipments increase

The largest offsetting increase was in the electrical and electronic products industry (+5.3%), which has been trending upwards since the winter of 1997. The machinery industry (+4.9%) also exhibited solid gains that were widespread and are consistent with the recently released increased investment intentions for machinery and equipment in 1998. After falling 5.7% in May, due to a market glut and price decreases, the wood industry (+3.0%) rebounded slightly as some mills that were shut in May reopened in June.

Ontario (-5.9%) was the province most affected by the automotive plant shutdowns. Gains were recorded in British Columbia (+5.3%), Alberta (+0.7%), Manitoba (+3.0%), and Prince Edward Island (+6.4%).

#### Automotive shipments plummet due to plant closures

The main contributors to the decrease in June were the motor vehicle (-20.6%), and motor vehicle parts and accessories (-9.1%) industries. Numerous Canadian manufacturing plants in these industries were shutdown

## Shipments by province

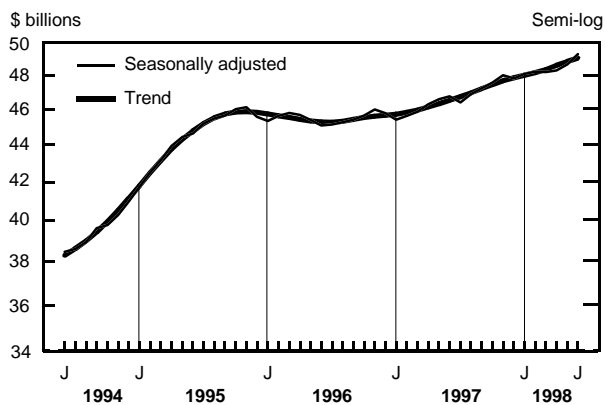
	May 1998	June 1998	May to June 1998
seasonally adjusted			
	\$ millions		% change
Newfoundland	159	155	-2.4
Prince Edward Island	66	70	6.4
Nova Scotia	541	540	-0.1
New Brunswick	686	657	-4.2
Quebec	8,727	8,695	-0.4
Ontario	19,830	18,658	-5.9
Manitoba	865	890	3.0
Saskatchewan	497	495	-0.3
Alberta	2,716	2,736	0.7
British Columbia	2,604	2,743	5.3
Territories	3	3	-4.4

## Inventories jump in June

Manufacturers' inventories increased 1.3% in June to \$49.3 billion. The June increase was the largest monthly increase in inventories since April 1995.

The major contributors to the increase in inventories were the aircraft and parts (+3.9%), railway rolling stock (+16.7%), and motor vehicle (+7.0%) industries. Inventories in the motor vehicle parts and accessories (+3.6%) industry also increased in June as many suppliers affected by assembly plant closures in the automotive industry built up inventories before shutting down.

### A strong increase in inventories in June



Consistent with the increased shipments recorded in June, the wood (-1.4%), and machinery (-1.2%)

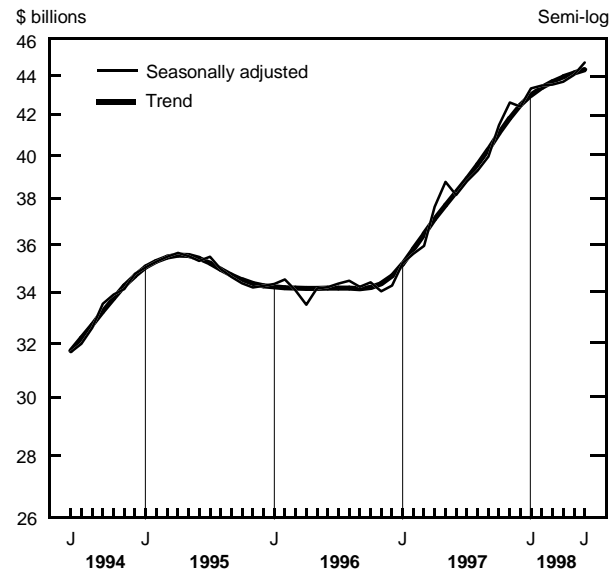
industries recorded the largest offsetting inventory declines.

June's decrease in shipments, combined with the rise in inventories, resulted in an increased inventory-to-shipments ratio of 1.38, up from 1.33 in May. The trend of the inventory-to-shipments ratio has increased dramatically in the last few months after hovering near record low levels since early 1997. Omitting the motor vehicle and motor vehicle parts and accessories industries, the inventory-to-shipments ratio was unchanged at 1.55 in June.

## Unfilled orders also increase in June

Manufacturers' backlog of unfilled orders increased 1.5% to \$44.7 billion in June. The increase continues the upward growth trend observed since late 1996. However, the torrid pace of growth in 1997 has slowed down in 1998.

### Unfilled orders on the rise



The largest increases in unfilled orders were in the transportation equipment (+1.9%) and machinery (+2.9%) industries in June.

Unfilled orders are often considered a key determinant of future shipments. However, just under half of the increase in unfilled orders since the beginning of 1997 has been in the aircraft and parts industry, where some orders can be stretched out over a number of years before they are completed. In addition, large orders in any industry may occasionally

have a component that is manufactured in other countries.

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

For further information on this release, consult the June issue of *Monthly Survey of Manufacturing*

(31-001-XPB, \$20/\$196), which will be available shortly. See *How to order publications*.

Data for shipments by province in greater detail than normally published may be available on request. For further information, contact Jean-Marie Houle (613-951-7200) or Craig Kuntz (613-951-7092; [kuncrai@statcan.ca](mailto:kuncrai@statcan.ca)), Monthly Survey of Manufacturing Section.

### Shipments, inventories and orders in all manufacturing industries

	Shipments		Inventories		Unfilled orders		New orders		Inventories- to- shipments ratio
	Seasonally adjusted								
	\$ millions	% change	\$ millions	% change	\$ millions	% change	\$ millions	% change	
June 1997	35,868	0.4	46,760	0.4	38,164	-1.5	35,271	-4.3	1.3
July 1997	37,382	4.2	46,386	-0.8	38,804	1.7	38,022	7.8	1.24
August 1997	36,375	-2.7	46,889	1.1	39,278	1.2	36,849	-3.1	1.29
September 1997	36,363	-0.0	47,231	0.7	39,954	1.7	37,040	0.5	1.3
October 1997	36,836	1.3	47,565	0.7	41,466	3.8	38,348	3.5	1.29
November 1997	36,823	-0.0	48,004	0.9	42,610	2.8	37,967	-1.0	1.3
December 1997	37,492	1.8	47,815	-0.4	42,394	-0.5	37,276	-1.8	1.28
January 1998	36,015	-3.9	48,079	0.6	43,315	2.2	36,936	-0.9	1.33
February 1998	37,093	3.0	48,220	0.3	43,473	0.4	37,250	0.9	1.3
March 1998	37,442	0.9	48,189	-0.1	43,518	0.1	37,487	0.6	1.29
April 1998	37,138	-0.8	48,301	0.2	43,674	0.4	37,294	-0.5	1.3
May 1998	36,695	-1.2	48,656	0.7	44,015	0.8	37,036	-0.7	1.33
June 1998	35,644	-2.9	49,289	1.3	44,682	1.5	36,311	-2.0	1.38

### Manufacturing industries except motor vehicle, parts and accessories

	Shipments		Inventories		Unfilled orders		New orders	
	Seasonally adjusted							
	\$ millions	% change	\$ millions	% change	\$ millions	% change	\$ millions	% change
June 1997	29,060	-0.3	43,821	-0.3	33,448	-1.8	28,452	-6.0
July 1997	29,916	2.9	43,876	0.1	33,988	1.6	30,455	7.0
August 1997	29,538	-1.3	44,419	1.2	34,493	1.5	30,044	-1.3
September 1997	29,660	0.4	44,662	0.5	35,052	1.6	30,218	0.6
October 1997	29,892	0.8	44,984	0.7	36,420	3.9	31,260	3.4
November 1997	29,787	-0.4	45,298	0.7	37,384	2.6	30,750	-1.6
December 1997	30,154	1.2	45,141	-0.3	36,881	-1.3	29,651	-3.6
January 1998	29,254	-3.0	45,266	0.3	37,568	1.9	29,942	1.0
February 1998	29,883	2.2	45,402	0.3	37,557	-0.0	29,872	-0.2
March 1998	30,131	0.8	45,435	0.1	37,539	-0.0	30,113	0.8
April 1998	30,069	-0.2	45,451	0.0	37,769	0.6	30,299	0.6
May 1998	29,673	-1.3	45,873	0.9	38,000	0.6	29,905	-1.3
June 1998	29,815	0.5	46,362	1.1	38,592	1.6	30,407	1.7

## Livestock estimates

July 1, 1998

The hog sector continued its long-term expansion, fuelled by exports of both live animals and pork. Canadian farmers have been competing aggressively in the U.S. market, taking advantage of economies of scale, abundant feed supplies and the shrinking Canadian dollar.

As of July 1, 1998, hog inventories had climbed to a record level of more than 12 million head, up 4.1% from the same period a year earlier. The sector has grown steadily for the past six quarters, following a cyclical drop in 1996. Despite the cycles, the sector has expanded 20.0% during the 1990s.

Meanwhile, Canada's cattle herd continued its contraction for the second year in a row, down 2.9% from 1997 to 14.4 million head. The estimated total inventory of sheep and lambs at July 1, 1998, was 838,000, up 1.4% from 1997 but down 1.1% from 1996.

These data come from the Livestock Survey, a telephone survey of 26,000 farm operators conducted from mid-June to early July. Farmers were asked to report the number of livestock they had on their farm as of July 1, 1998.

### Livestock inventories at July 1

	Cattle		Hogs	
	1997	1998	1997	1998
	thousands			
<b>Canada</b>	<b>14,791</b>	<b>14,366</b>	<b>11,695</b>	<b>12,178</b>
Atlantic	332	325	342	344
Quebec	1,466	1,388	3,542	3,626
Ontario	2,259	2,172	3,122	3,189
Manitoba	1,449	1,415	1,810	2,041
Saskatchewan	2,885	2,735	862	925
Alberta	5,565	5,546	1,836	1,857
British Columbia	835	785	181	196

### Hog and pork exports surging

During the first half of 1998, exports of live pigs were 28.6% higher compared with the same period last year, and reached more than 1.9 million head in response to the demand from U.S. slaughterhouses. Exports have nearly quadrupled during the 1990s. Live hog exports were worth \$445 million in 1997.

The recent closure of a large slaughterhouse in Alberta helped spur exports. For the meat-processing sector in Canada, live hog exports represent the loss of an opportunity. However, it is expected that the major pork processing plant scheduled to open in Manitoba

in 1999 will take advantage of the large export supplies of hogs from Ontario and the West.

Exports of pork meat have risen consistently throughout this decade and reached 416,000 tonnes in 1997, up 40.1% since 1990. These exports were worth over \$1 billion. Although the United States is Canada's most important customer, claiming 57.5% of pork exports in 1997, other countries such as Japan, Russia and South Korea are increasingly important.

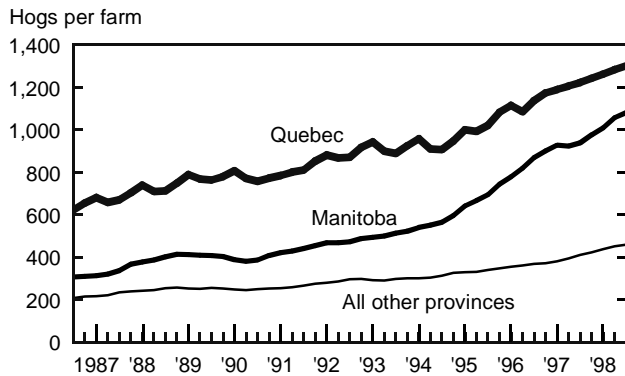
Canada exports pork to more than 80 countries, building on a reputation for quality pork raised under strict health and safety standards. Exports to Japan alone increased substantially from 1996 to 1997 as a result of an outbreak of foot and mouth disease in Taiwan, which was Japan's major supplier.

Exports are crucial to the expansion of the hog industry because Canadians in general are eating less red meat. Even though consumption per person of pork fluctuates from year to year, it is declining slowly over time. The same phenomenon is observed in the United States, although demand for bacon has been rising there as fast-food restaurants add it to their menus.

### Hog producers are more efficient

Several factors have favoured Canadian hog production. Hog producers have expanded their capacity and taken advantage of new technologies to become more efficient. More hogs are now produced on larger operations, with the average number of hogs per farm doubling to over 600 during the 1990s. These economies of scale have led to profits for feed-efficient producers. Producers are increasingly more competitive, reducing the number of days to market while increasing the production per sow, in terms of both the number and weight marketed per year per sow.

### From small family hog farm to efficient family enterprise



In addition, the abundance of feed grain on the Prairies has provided a comparative advantage fostering the expansion of the hog industry. The 1995 demise of the Crow Rate, which regulated the transport of western feed grains, has encouraged increased feeding of livestock in the West.

The strong U.S. dollar favours exporters, although the economic turmoil in Asian countries has devalued many currencies, reducing their purchasing power.

One important factor dampening the expansion is the low price for hogs. Prices have been falling since September 1997. Prices for hogs were 21.3% lower in June 1998 than the strong prices experienced during the same month last year. Falling feed costs partly offset the low prices for hogs — particularly in recent months. The decline coincides with increased global production of feed grains.

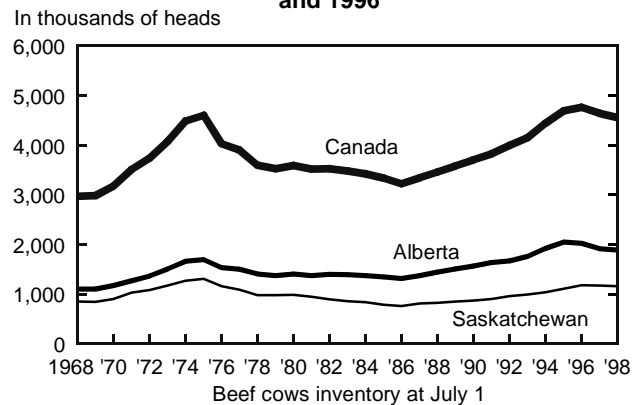
### Cattle herd declining

Farmers reported a decrease in the number of cattle on farms as of July 1, 1998. Total cattle and calves inventory stood at 14.4 million head, 2.9% below 1997 and 4.4% lower than the peak of 1996.

The current contraction phase of the cattle cycle, which follows the longest expansion phase in recorded history, has persisted into 1998, with high levels of marketings and a shrinking inventory of breeding stock. Abundant supplies of beef in North America, declining

international exports and weak prices since 1993 have resulted in low profits for cattle producers. Prices improved in 1997 and 1998, although they remain well below the peaks of 1993.

### The longest beef herd expansion in history occurred between 1986 and 1996



The downward trend towards lower beef consumption has continued in both Canada and the United States as consumers eat more poultry. Families pressed for time are increasingly choosing prepared and pre-packaged foods that often contain poultry.

During the first six months of 1998, cattle and calves exports (primarily to the United States) declined to 668,000, down 5.0% from the same period in 1997, and down 21.9% from the peak of 1996. In the first half of 1996, exports reached a peak of 855,000 head after surging for a decade.

**Available on CANSIM: matrices 1150, 1151, 1166, 5645 and 9500-9510.**

For further information, consult *Livestock statistics update* (23-603-UPE, \$45/\$149), which will be available shortly. See *How to order publications*.

For further information on this release, contact Robert Plourde (613-951-8716; [plourob@statcan.ca](mailto:plourob@statcan.ca)), Agriculture Division. ■

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## OTHER RELEASES

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### Mineral wool including fibrous glass insulation

July 1998

Manufacturers shipped 2 221 159 square metres of R12 factor (RSI 2.1) mineral wool batts in July, down 3.9% from 2 310 980 (revised) square metres a year earlier and down 29.9% from 3 168 919 square metres a month earlier.

Year-to-date shipments to the end of July 1998 totalled 18 041 847 square metres, up 31.2% compared with the same period in 1997.

**Available on CANSIM: matrices 40 and 122 (series 32-33).**

The July 1998 issue of *Mineral wool including fibrous glass insulation* (44-004-XPB, \$7/\$62) will be available shortly. See *How to order publications*.

For further information on this release, contact Randal Sheldrick (613-951-7199; [shelran@statcan.ca](mailto:shelran@statcan.ca)), Manufacturing, Construction and Energy Division. ■

### Electric lamps

July 1998

Light bulb and tube manufacturers sold 18.3 million light bulbs and tubes in July, a decrease of 16.4% from the 21.9 million a year earlier.

Year-to-date sales at the end of July 1998 totalled 159.9 million light bulbs and tubes, down 6.0% from the 170.1 million a year earlier.

The July 1998 issue of *Electric lamps* (43-009-XPB, \$7/\$62) will be available shortly. See *How to order publications*.

For further information on this release, contact Laurie Vincent (613-951-3523; [vincwil@statcan.ca](mailto:vincwil@statcan.ca)), Manufacturing, Construction and Energy Division. ■

### Production and value of ranch-raised pelts

1996 (revised) and 1997 (preliminary)

Data on the production and value of mink and fox pelts are now available for 1996 and 1997. Data are tabulated by province.

**Available on CANSIM: matrices 3400 and 3402-3414.**

These data will be available in *Livestock statistics updates* (23-603-UPE, \$45/\$149), which will be available shortly. See *How to order publications*.

For further information on this release, contact Bernadette Alain (902-893-7251), Agriculture Division. ■



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## PUBLICATIONS RELEASED

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**Infomat — A weekly review**, August 21, 1998  
**Catalogue number 11-002-XIE**  
(Canada: \$3/\$109; outside Canada: US\$ 3/US\$109).

**Infomat — A weekly review**, August 21, 1998  
**Catalogue number 11-002-XPE**  
(Canada: \$4/\$145; outside Canada: US\$ 4/US\$145).

**Particleboard, oriented strandboard and fibreboard**, June 1998  
**Catalogue number 36-003-XPB**  
(Canada: \$7/\$62; outside Canada: US\$ 7/US\$62).

**Industrial chemicals and synthetic resins**, June 1998  
**Catalogue number 46-002-XPB**  
(Canada: \$7/\$62; outside Canada: US\$ 7/US\$62).

**New motor vehicle sales**, June 1998  
**Catalogue number 63-007-XIB**  
(Canada: \$13/\$124; outside Canada: US\$ 13/US\$124).

**Canadian international merchandise trade**, June 1998  
**Catalogue number 65-001-XIB**  
(Canada: \$14/\$141; outside Canada: US\$ 14/US\$141).

**Canadian international merchandise trade**, June 1998  
**Catalogue number 65-001-XPB**  
(Canada: \$19/\$188; outside Canada: US\$ 19/US\$188).

**Imports by country**, January-June 1998  
**Catalogue number 65-006-XMB**  
(Canada: \$62/\$206; outside Canada: US\$ 62/US\$206).

**Imports by country**, January-June 1998  
**Catalogue number 65-006-XPB**  
(Canada: \$124/\$412; outside Canada: US\$124/US\$412).

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
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<b>MAJOR RELEASES</b>	
• <b>Urban transit, 1995</b> Despite the emphasis on taking urban transit, Canadians are using it less and less. In 1995, each Canadian took an average of about 40 trips on some form of urban transit, the lowest level in the past 25 years.	2
• <b>Productivity, hourly compensation and unit labour cost, 1995</b> Growth in productivity among Canadian businesses was notably weak again in 1995 accompanied by sluggish gains in employment and slow modest growth during the year.	4
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Head of Official Release: Chantal Prévost (613-951-1088, [prevcha@statcan.ca](mailto:prevcha@statcan.ca))

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