



The Daily

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MAJOR RELEASES

- **Monthly Survey of Manufacturing, November 1998** 2
Led by the motor vehicle industry, manufacturers' shipments rose 1.0% in November to \$38.6 billion. Excluding the automotive sector, shipments rose 0.5%.

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MAJOR RELEASES

Monthly Survey of Manufacturing

November 1998

Led by the motor vehicle industry, manufacturers' shipments rose 1.0% in November to \$38.6 billion. Excluding the automotive sector, shipments rose 0.5% in November.

November's result marks the fourth consecutive monthly increase following the resolution of the U.S. General Motors strike. This strong upward turn in the trend of manufacturers' shipments follows a lacklustre performance during the first seven months of the year. Total manufacturing shipments now stand 4.9% above the November 1997 level.

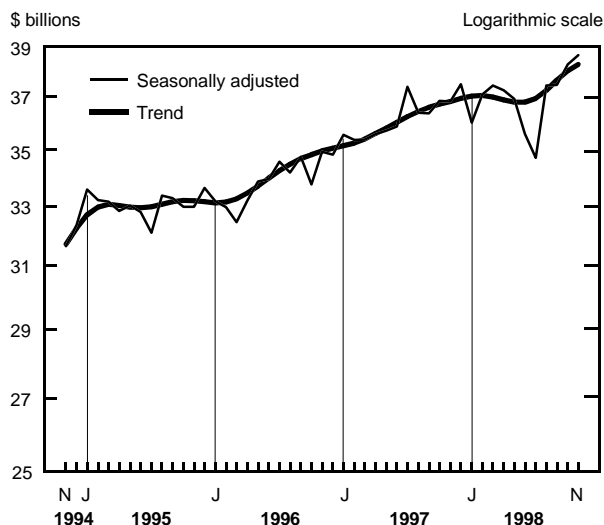
Unfilled orders slipped in November, while inventories rose moderately.

The December Labour Force Survey revealed little change in employment in the manufacturing sector.

Shipments continue to climb in November

Manufacturers' shipments increased in 13 of 22 major groups in November, representing 69.7% of the total value of shipments.

Shipments increase again in November



Note to readers

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 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 manufacturers in other countries.

The largest contributor to November's increase of \$372 million was the motor vehicle industry, up by \$199 million (+3.6%). The resolution of the General Motors strike in the United States, and the addition of new assembly lines and new model launches continued to be contributing factors.

The next largest contributor to November's rise was the food industry (+\$153 million or +3.6%), where shipments rebounded in November following declines in September and October. Relatively stronger than normal November shipments of vegetable oils were the main determinant. From August to November, the volume of canola crushed rose 10.9% from the same period in 1997. A return to more normal seasonal levels in the canned and preserved fruit and vegetable industry was also an important factor.

The largest offsetting decrease in November shipments was \$89 million (-3.2%) in the electrical and electronic products industry, led by declines in the electronic parts and components, and computers and peripheral equipment sub-categories.

A drop of \$59 million (-4.1%) in the refined petroleum and coal industry was the second largest offsetting decrease and was influenced by a combination of lower prices for gasoline and fuel oils and unseasonably mild temperatures.

Manufacturers' shipments increased in eight of the 12 provinces and territories in November. Prince Edward Island, Newfoundland, British Columbia, and Quebec were the exceptions.

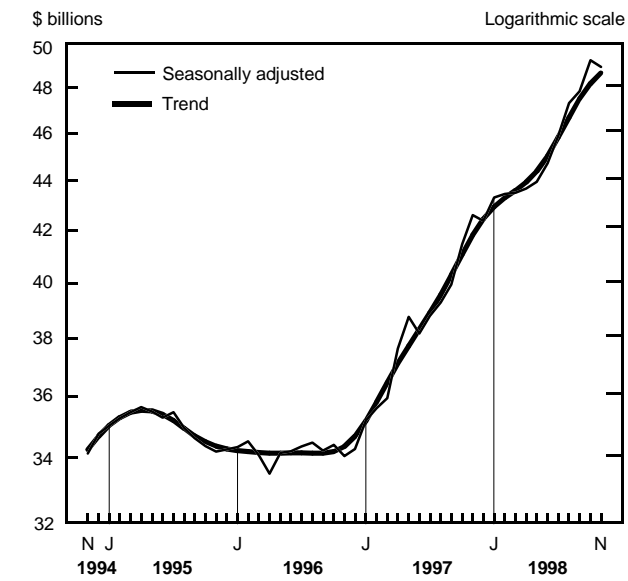
Shipments by province

	Oct. 1998	Nov. 1998	Oct. to Nov. 1998
seasonally adjusted			
	\$ millions		% change
Newfoundland	147	139	-5.3
Prince Edward Island	91	83	-8.2
Nova Scotia	564	576	2.0
New Brunswick	685	698	1.9
Quebec	8,962	8,949	-0.1
Ontario	20,927	21,260	1.6
Manitoba	872	902	3.4
Saskatchewan	478	491	2.7
Alberta	2,629	2,673	1.7
British Columbia	2,912	2,868	-1.5
Northwest Territories and Yukon	3	3	2.8

Unfilled orders slip in November

Manufacturers' backlog of unfilled orders fell 0.6% to \$48.9 billion in November. This decline contrasted with the strong increase observed in the five months from June to October. Despite November's decrease, unfilled orders remained 14.8% above the November 1997 level.

Unfilled orders slip in November



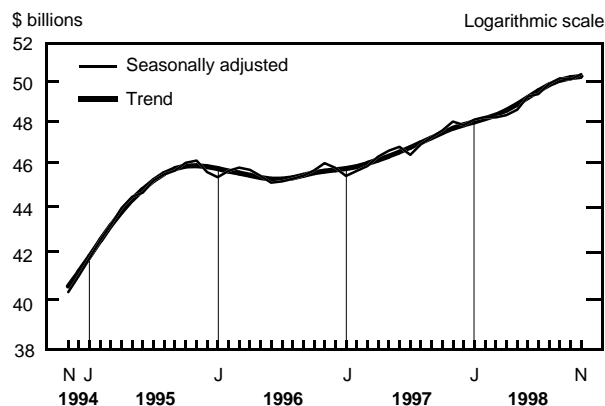
The largest decreases in unfilled orders were in the aircraft and parts (-0.7%) and electrical and

electronic products (-1.3%) industries. The largest offsetting increases were in the fabricated metal products (+2.0%) and truck, bus body and trailer (+13.4%) industries.

Inventories rise in November

Manufacturers' inventories increased 0.5% in November to \$50.4 billion.

Inventories rise in November



The main contributors to November's growth were the motor vehicle (+13.3%), and electrical and electronic products (+3.5%) industries.

The largest offsetting decreases were in the machinery (-1.9%), aircraft and parts (-1.4%), and wood (-1.0%) industries.

November's increase in shipments outpaced the rise in inventories resulting in a decreased inventory-to-shipments ratio of 1.30, down from 1.31 in October. This ratio has been decreasing over the past few months after climbing gradually in the spring and skyrocketing to a high of 1.42 in June and July. November's result nudges the trend back within two basis points of low levels observed throughout most of 1997.

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

For more information, consult the November 1998 issue of *Monthly Survey of Manufacturing* (31-001-XPB, \$20/\$196), available shortly.

Data for shipments by province in greater detail than normally published may be available on request. For further information, or to enquire about the concepts, methods, and data quality of

this release, contact Craig Kuntz (613-951-7092; 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	
November 1997	36,823	0.0	48,004	0.9	42,610	2.8	37,967	-1.0	1.30
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	1.30
March 1998	37,442	0.9	48,189	-0.1	43,518	0.1	37,487	0.6	1.29
April 1998	37,254	-0.5	48,314	0.3	43,676	0.4	37,412	-0.2	1.30
May 1998	36,912	-0.9	48,576	0.5	43,962	0.7	37,198	-0.6	1.32
June 1998	35,587	-3.6	49,238	1.4	44,722	1.7	36,347	-2.3	1.38
July 1998	34,706	-2.5	49,372	0.3	45,883	2.6	35,867	-1.3	1.42
August 1998	37,436	7.9	49,895	1.1	47,312	3.1	38,865	8.4	1.33
September 1998	37,461	0.1	50,160	0.5	47,834	1.1	37,983	-2.3	1.34
October 1998	38,270	2.2	50,124	-0.1	49,234	2.9	39,670	4.4	1.31
November 1998	38,641	1.0	50,369	0.5	48,924	-0.6	38,331	-3.4	1.30

Manufacturing industries except motor vehicle, parts and accessories

	Shipments		Inventories		Unfilled orders		New orders	
	seasonally adjusted							
	\$ millions	%	\$ millions	%	\$ millions	%	\$ millions	%
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	30,063	-0.2	45,466	0.1	37,770	0.6	30,294	0.6
May 1998	29,736	-1.1	45,806	0.7	37,935	0.4	29,902	-1.3
June 1998	29,889	0.5	46,290	1.1	38,590	1.7	30,543	2.1
July 1998	29,720	-0.6	46,525	0.5	39,521	2.4	30,651	0.4
August 1998	30,239	1.7	46,826	0.6	40,802	3.2	31,520	2.8
September 1998	30,168	-0.2	46,984	0.3	41,100	0.7	30,466	-3.3
October 1998	30,216	0.2	46,929	-0.1	42,144	2.5	31,261	2.6
November 1998	30,368	0.5	46,909	-0.0	41,843	-0.7	30,067	-3.8

OTHER RELEASES

Travel between Canada and other countries

November 1998

The number of same-day car trips by Canadians to the United States increased 0.6% to 2.2 million from the record low set in October. Meanwhile, the number of same-day car trips by Americans to Canada increased 2.2% from October and set a new high of 2.4 million. (Unless otherwise specified, the data are seasonally adjusted.)

Overnight travel (one or more nights) also increased in both directions. Canadians made 1.1 million overnight trips to the United States in November, up 0.9% from October. Meanwhile, Americans continued to travel to Canada in record numbers and set a new record of 1.3 million overnight trips, up 2.4% from October.

For travel to countries other than the United States, Canadians made 370,000 overnight trips to overseas destinations in November, a 2.7% increase from October, while the number of overnight trips by overseas visitors declined slightly to 327,000.

On a year-over-year basis, Canadians made 2.0 million same-day car trips to the United States in November, a 23.2% decline from November 1997. In contrast, Americans made 2.1 million same-day car trips to Canada, up 12.3% from November 1997 (unadjusted data).

Overnight trips by overseas visitors declined 1.6% in November as compared with November 1997. Visitors from Asian countries showed the largest decline with 9.5% fewer trips than in November 1997. The only Asian countries with an increase in travel to Canada were Japan (+3.0%) and Taiwan (+11.7%). Meanwhile, Canadians took 5.4% more overnight trips to overseas countries in November compared with November 1997 (unadjusted data).

Note: Month-to-month comparisons use seasonally adjusted data. Year-over-year comparisons use unadjusted data.

Available on CANSIM: matrices 2661-2697, 5780-6048 and 8200-8329.

The November 1998 issue of *International travel, advance information* (66-001-PPB, \$8/\$73) will be available shortly. See *How to order publications*.

For further information, or to enquire about the concepts, methods and data quality of this release, contact Mark Irving (613-951-0401; fax: 613-951-2909; mark.irving@statcan.ca) or André Cyr (613-951-0277; fax: 613-951-2909; andre.cyr@statcan.ca), International Travel Section, Culture, Tourism and the Centre for Education Statistics. □

Travel between Canada and other countries

	Oct. 1998 ^r	Nov. 1998 ^p	Oct. to Nov. 1998 ^p	Nov. 1998 ^p	Nov. 1997 to Nov. 1998 ^p	Jan.-Nov. 1998 ^p
	seasonally adjusted			unadjusted		
	'000	% change		'000	% change	'000
Canadian trips abroad						
Same-day car trips to the United States	2,155	2,167	0.6	2,006	-23.2	26,332
Total trips, one or more nights	1,461	1,480	1.3	1,158	-6.0	16,546
United States ¹	1,101	1,111	0.9	879	-9.2	12,621
Car	607	612	0.8	407	-19.7	7,222
Plane	397	404	1.8	413	5.1	4,228
Other modes of transportation	97	94	-2.8	59	-13.3	1,171
Other countries ²	360	370	2.7	279	5.4	3,925
Travel to Canada						
Same-day car trips from the United States	2,346	2,398	2.2	2,051	12.3	25,017
Total trips, one or more nights	1,632	1,662	1.9	905	13.3	17,823
United States ¹	1,304	1,335	2.4	747	17.0	14,072
Car	825	838	1.6	449	14.5	8,918
Plane	320	332	3.5	233	22.9	3,394
Other modes of transportation	159	166	4.2	65	14.8	1,761
Other countries ²	328	327	—	158	-1.6	3,751

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

² Figures for other countries exclude same-day entries by land only, via the United States.

^p Preliminary figures.

^r Revised figures.

- Amount too small to be expressed.

Finances of provincial and territorial government enterprises

Fiscal year ended nearest to December 31, 1996.

In 1996, provincial and territorial government business enterprises earned an after-tax profit of \$5.4 billion, down \$2.5 billion (-31.5%) from the previous year as electric power utilities recorded a one-time corporate write-off of \$2.6 billion. Electric power utilities posted losses of \$0.9 billion compared with a profit of \$1.3 billion in 1995. Liquor authorities, and lottery and gaming enterprises earned \$2.6 billion and \$3.6 billion respectively in 1996.

Total income increased \$1.1 billion to \$52.5 billion, while total expenses rose \$3.6 billion to \$47.1 billion.

Among the provinces, Ontario recorded a loss of \$0.3 billion compared with a profit of \$2.2 billion in 1995. The drop was due to major restructuring expenses that generated a write-off of \$2.6 billion in 1996 by Ontario Hydro.

Profits remitted to provincial and territorial governments reached \$6.8 billion, up \$0.6 billion

(+9.6%) over 1995. Liquor authorities, and lottery and gaming enterprises remitted \$2.4 billion and \$3.4 billion respectively to provincial and territorial governments.

Total assets of provincial and territorial government business enterprises stood at \$182.9 billion at the end of 1996, down \$2.9 billion (-1.5%) from 1995. The gross debt (total liabilities) decreased by \$1.1 billion to \$158.8 billion at the end of 1996.

Note: Data are calculated using the Financial Management System (FMS) which standardizes the presentation of government accounting for federal, provincial, and local governments. The individual governments' accounting systems are not directly comparable because of differing policies and structures. So the FMS adjusts data from government public accounts and other records to provide comparable data. As well, the FMS provides national aggregates that are consistent over time.

Data are available through custom and special tabulation. For more information or general inquiries

on the products or services of the Public Institutions Division, contact Viola Jabbour (613-951-0767; jabbvio@statcan.ca).

Available on CANSIM: matrix 3267-3270.

For more information, or to enquire about the concepts, methods, and data quality of this release, contact Richard Sauriol at (613-951-1829; saurric@statcan.ca) or Jean-François Carbonneau at (613-951-8561; carbjea@statcan.ca), Public Institutions Division.

Provincial and territorial liquor and gaming business enterprises - net income and remittance to provinces and territories

For the year-end nearest to December 31

	Net income			Remittance		
	Provincial and territorial liquor authorities	Lottery and gaming enterprises	Total	Provincial and territorial liquor authorities	Lottery and gaming enterprises	Total
	millions of dollars					
1986	2,151	1,228	3,379	2,134	1,216	3,350
1987	2,214	1,275	3,489	2,067	1,288	3,355
1988	2,283	1,376	3,659	2,300	1,347	3,647
1989	2,386	1,392	3,778	2,181	1,428	3,609
1990	2,342	1,420	3,762	2,410	1,416	3,826
1991	2,382	1,495	3,877	2,356	1,466	3,822
1992	2,393	1,741	4,134	2,376	1,701	4,077
1993	2,389	2,152	4,541	2,384	2,145	4,529
1994	2,484	2,891	5,375	2,347	2,783	5,130
1995	2,526	3,236	5,762	2,666	3,100	5,766
1996	2,614	3,594	6,208	2,375	3,424	5,799
Total	26,164	21,800	47,964	25,596	21,314	46,910

Construction Union Wage Rate Index

December 1998

The Construction Union Wage Rate Index (including supplements) for Canada (1992=100) remained unchanged from November at 112.0. On a year-over-year basis, the index increased by 0.8% in December compared with December 1997.

Union wage rates are published for 16 trades in 20 metropolitan areas for both the basic rates and rates including selected supplementary payments. Indexes on a 1992=100 time base are calculated for the same metropolitan areas and are published for those where a majority of trades are covered by current collective agreements.

Available on CANSIM: matrices 956, 958 and 9922-9927.

The fourth quarter 1998 issue of *Construction price statistics* (62-007-XPB, \$24/\$79) will be available in March 1999. See *How to order publications*.

For further information, or to enquire about the concepts, methods, and data quality of this release, contact Louise Chaîné (613-951-3350; fax: 613-951-1539; infounit@statcan.ca), Client Services Unit, Prices Division.

Selected financial indexes

December 1998

December 1998 figures are now available for the Selected Financial Indexes on a 1992=100 time base.

Available on CANSIM: matrix 9928.

The fourth quarter 1998 issue of *Construction price statistics* (62-007-XPB, \$24/\$79) will be available in March 1999. See *How to order publications*.

For further information, or to enquire about the concepts, methods, and data quality of this release, contact Louise Chaîné (613-951-3350; fax: 613-951-1539; infounit@statcan.ca), Client Services Unit, Prices Division.

Telephone statistics

October 1998

Canada's 14 major telephone systems reported monthly revenues of \$1,479.9 million in October, a 2.5% increase from October 1997. Operating expenses were \$1,075.0 million, down 1.4% from October 1997. Net operating revenue totalled \$404.9 million, a 14.3% increase from October 1997.

The October 1998 issue of *Telephone statistics* (56-002-XIB, \$8/\$70) is now available. See *How to order publications*.

For more information, or to enquire about the concepts, methods, and data quality of this release, contact Haig McCarrell (613-951-5948), Science and Technology Redesign Project. ■

Available on CANSIM: matrix 355.

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