



The Daily

Statistics Canada

Tuesday, February 2, 1999

For release at 8:30 a.m.

MAJOR RELEASES

- **Quarterly Business Conditions Survey: Manufacturing Industries, January 1999**

Manufacturers indicated that they were generally satisfied with prospects for production and employment in the coming three months.

2
- **Field crop reporting series: Grain stocks, December 31, 1998**

On December 31, 1998, total stocks of wheat recovered marginally from the nine-year low established in December 1997. Stocks of barley declined while canola stocks were higher than both last year's level and the five-year average.

5

OTHER RELEASES

- Domestic sales of refined petroleum products, annual 1998 and December 1998

6
- Asphalt roofing, December 1998

7
- Telephone statistics, November 1998

7

PUBLICATIONS RELEASED

8



MAJOR RELEASES

Quarterly Business Conditions Survey: Manufacturing Industries

January 1999

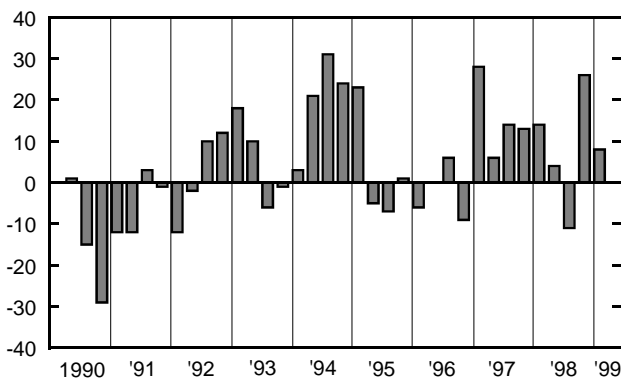
In the January survey, manufacturers indicated that they were generally satisfied with prospects for production and employment in the coming three months. Overall, they did not feel that the current level of finished product inventory was a source of concern. However, manufacturers were slightly less satisfied with the current levels of new orders.

Production prospects are still positive

In January, the balance of opinion regarding production prospects during the coming three months decreased 18 points to a more normal +8. This followed results from the previous two surveys that had been greatly affected by July's General Motors' labour disputes in the United States and their subsequent impact on the automotive sector in Canada. Seventeen percent of manufacturers expected to increase production in the coming quarter, and 74% indicated that they plan to maintain the same level of production.

The balance of opinion (+8) was arrived at by subtracting the 9% of manufacturers who stated that production prospects for the coming three months would be "lower" than the previous three months from the 17% who said prospects would be "higher".

Balance of opinion for expected volume of production, next three months vs. previous three months



Note to users

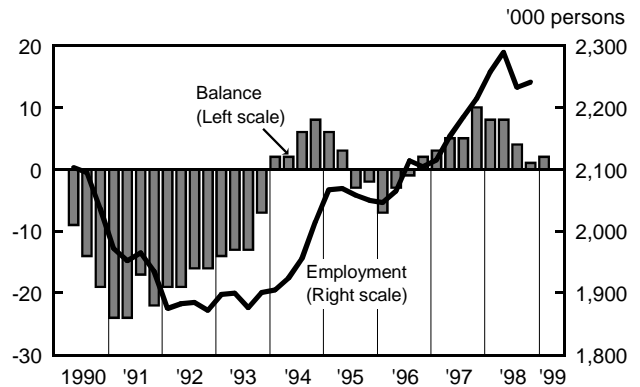
The business conditions survey is conducted in January, April, July and October; the majority of responses are recorded in the first two weeks of these months. Results are based on replies from about 5,000 manufacturers and are weighted by a manufacturer's shipments or employment. Consequently, larger manufacturers have a correspondingly larger impact on the results than smaller manufacturers.

Except for the data on production difficulties, data in this release are seasonally adjusted.

Manufacturers anticipate little change in employment

The balance of opinion concerning employment prospects for the next three months was up 1 point to +2 in the January survey. Twelve percent of manufacturers stated they would decrease their workforce, whereas 14% said they would increase employment levels. Some 74% of manufacturers reported that their workforce would be little changed in the coming three months. According to the December 1998 Labour Force Survey, employment in manufacturing finished the year little changed (+15,000) after a strong 6.3% increase in 1997 (+132,000).

Balance of opinion on employment prospects during the next three months and manufacturing employment (LFS)



Manufacturers slightly less concerned about the level of finished-product inventories

As in the October survey, 80% of manufacturers felt that their current level of finished-products

inventory was about right. Sixteen percent of manufacturers stated that inventories were too high whereas 4% said that inventories were too low. The current balance of opinion stood at -12, a four-point decrease from the October level. Results from the November 1998 Monthly Survey of Manufacturing showed manufacturers were holding some \$17.3 billion in finished-products inventory, 7.5% higher than the inventory level posted for November 1997.

Manufacturers less satisfied with the level of orders received

In January, manufacturers' balance of opinion concerning the current level of orders received decreased seven points to -2. The contributing factor to the balance becoming negative was a seven-point decrease in the number of manufacturers stating new orders were rising. The transportation equipment industries were the major contributors to this decrease.

Most manufacturers satisfied with current level of unfilled orders

In January, some 81% of manufacturers indicated that the current level of unfilled orders was about normal, a seven-point increase over October's result. Overall, manufacturers' satisfaction with the current level of unfilled orders remained negative in the January

survey. With 12% stating unfilled orders would be lower than normal, and 7% stating they would be higher than normal, the balance of opinion stood at -5. This was little changed from the -6 balance posted in the previous two surveys.

Skilled labour shortages less of a concern

About 87% of manufacturers reported not having production impediments in early January. A shortage of skilled labour continued to be a concern for 5% of manufacturers, a 3% improvement over the October survey results. Only 2% of manufacturers said that a shortage of raw materials was a concern, down from 13% in July and 3% in October. The abnormally high July level was mostly attributable to a break in the flow of parts in the automotive industry caused by the strikes in the United States. Working capital shortages were indicated as a concern by 3% of respondents, up from 2% in October.

Available on CANSIM: matrices 2843-2845.

For more information, or to enquire about the concepts, methods, and data quality of this release, please contact Claude Robillard (613-951-3507; robilcg@statcan.ca), Monthly Survey of Manufacturing Section, Manufacturing, Construction and Energy Division. □

Business Conditions Survey: Manufacturing Industries
January 1999

	Jan. 1998	Apr. 1998	July 1998	Oct. 1998	Jan. 1999
	seasonally adjusted				
Volume of production during next three months compared with last three months will be:					
About the same	68	60	45	44	74
Higher	23	22	22	41	17
Lower	9	18	33	15	9
Balance	14	4	-11	26	8
Orders received are:					
About the same	60	59	72	69	76
Rising	27	18	14	18	11
Declining	13	23	14	13	13
Balance	14	-5	0	5	-2
Present backlog of unfilled orders is:					
About normal	74	77	80	74	81
Higher than Normal	14	10	7	10	7
Lower than Normal	12	13	13	16	12
Balance	2	-3	-6	-6	-5
Finished product inventory on hand is:					
About right	79	80	84	80	80
Too low	6	3	2	2	4
Too high ¹	15	17	14	18	16
Balance	-9	-14	-12	-16	-12
Employment during the next three months will:					
Change little	74	70	70	73	74
Increase	17	19	17	14	14
Decrease	9	11	13	13	12
Balance	8	8	4	1	2
	unadjusted				
Sources of production difficulties:					
Working capital shortage	3	2	4	2	3
Skilled labour shortage	8	7	7	8	5
Unskilled labour shortage	0	1	0	1	0
Raw material shortage	2	2	13	3	2
Other difficulties	4	2	4	4	3
No difficulties	81	85	74	83	87

¹ No evident seasonality

Field crop reporting series: Grain stocks

December 31, 1998

On December 31, 1998, total stocks of wheat recovered marginally from the nine-year low established the previous December. Stocks of barley declined compared with December 1997 and were also lower than the average of the last five years. Stocks of canola, Canada's major oilseed, were higher than both last year's level and the five-year average.

Total stocks of grain at December 31

	1997	1998	1997 to 1998 %
	'000 tonnes		change
All Wheat	19,240	20,434	6
Wheat excl. durum	15,495	15,189	-2
Barley	10,069	9,651	-4
Corn	6,001	7,224	20
Canola	3,768	3,894	3
Durum Wheat	3,745	5,245	40
Oats	2,284	2,776	22
Soybeans	1,792	1,770	-1
Flax	550	595	8

Reduced exports triggered a rise in total wheat stocks

Total wheat stocks for December (stocks held on farms plus stocks in commercial positions) were 20.4 million tonnes, 6% more than last year's 19.2 million tonnes. They were also 10% less than the five-year average of 22.7 million tonnes. Production of all wheat in the current crop-year was unchanged from the 1997/1998 crop-year, but exports declined by 42% in the five-month period ending December 31. Total wheat stocks

on farms were 995,000 tonnes more than last year, while commercial stocks increased by only 200,000 tonnes.

Stocks of durum wheat increased 40%, primarily the result of a rise in production in 1998.

Lower production was behind the drop in barley stocks

Total stocks of barley, Canada's most important feed grain, were 418,000 tonnes less than last year's level of 10.07 million tonnes. The total is also 473,000 tonnes less than the five-year average of 10.12 million tonnes. Farm stocks dropped by only 30,000 tonnes to a level of 8.9 million tonnes, while commercial stocks fell 388,000 tonnes to a record low of 771,000 tonnes. The decrease in barley stocks can be mainly attributed to a 6% production decrease in the 1998/1999 crop-year.

Total stocks of canola were the highest since 1995

Farm stocks of canola decreased by 55,000 tonnes and commercial stocks rose by 181,000 tonnes, leaving total stocks 3% higher than last year. This result was 90,000 tonnes above the five-year average. Increased stocks were due to a 19% rise in production in the 1998/1999 crop-year, and has been offset by a 76% increase in exports and record domestic industrial use.

Field crop reporting series no. 1: Stocks of Canadian grain at December 31, 1998 (22-002-XPB, \$15/\$88) 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 David Burroughs (613-951-5138; burrdav@statcan.ca), Crops Section, Agriculture Division. ■

OTHER RELEASES

Domestic sales of refined petroleum products

Annual 1998 and December 1998 (preliminary)

For 1998, overall sales of refined petroleum products increased 2.3%, with sales rising in five of the seven major product groups. The important 23.7% gain for heavy fuel oil was due to greater use of the product for the generation of electricity. The 2.9% advance for motor gasoline, which accounted for 40.4% of the total, was mainly explained by lower retail prices and favourable weather. As a result of unseasonably mild temperatures, especially during the heating season, sales of light fuel oil fell 15.1%.

For December 1998, sales of refined petroleum products totalled 7 850 300 cubic metres, up 1.2% from December 1997. Sales increased for four of the seven major product groups compared with the same period in 1997. The largest gains were recorded for heavy fuel oil (+164 100 cubic metres or +22.9%) and motor gasoline (+76 200 cubic metres or +2.4%). The largest decrease was in the "other refined products" category (-122 500 cubic metres or -17.8%), which contains products such as asphalt, lube oils, petroleum coke, and stove oil.

Sales of refined petroleum products

	Dec. 1997 ^r	Dec. 1998 ^p	Dec. 1997 to Dec. 1998
	thousands of cubic metres		% change
Total, all products	7,759.2	7,850.3	1.2
Motor gasoline	3,117.3	3,193.5	2.4
Diesel fuel oil	1,702.5	1,680.2	-1.3
Light fuel oil	702.7	671.4	-4.5
Heavy fuel oil	717.6	881.7	22.9
Aviation turbo fuels	442.5	450.7	1.9
Petrochemical feedstocks ¹	389.0	407.7	4.8
All other refined products	687.6	565.1	-17.8

	Jan. to Dec. 1997 ^r	Jan. to Dec. 1998 ^p	Jan.- Dec. 1997 to Jan.- Dec. 1998
	thousands of cubic metres		% change
Total, all products	90,280.6	92,391.6	2.3
Motor gasoline	36,293.8	37,361.3	2.9
Diesel fuel oil	21,280.3	21,377.7	0.5
Light fuel oil	5,559.1	4,717.3	-15.1
Heavy fuel oil	6,878.3	8,506.7	23.7
Aviation turbo fuels	5,799.7	5,972.5	3.0
Petrochemical feedstocks ¹	4,562.2	4,825.6	5.8
All other refined products	9,907.2	9,630.5	-2.8

^r Revised

^p Preliminary

¹ Materials produced by refineries that are used by the petrochemical industry to produce chemicals, synthetic rubber and a variety of plastics.

Available on CANSIM: matrices 628-642 and 644-647.

The December 1998 issue of *Refined petroleum products* (45-004-XPB, \$21/\$206), will be available in March 1999. See *How to order publications*.

For more information, or to enquire about the concepts, methods and data quality of this release, contact Eleonore Harding (613-951-5708; hardele@statcan.ca) or Michel Palardy (613-951-7174; palamic@statcan.ca), Energy Section, Manufacturing, Construction and Energy Division. ■

Asphalt roofing

December 1998

Production of asphalt shingles totalled 1 945 504 metric bundles in December, a 3% decrease from 2 005 781 metric bundles produced in December 1997.

Overall 1998 production amounted to 41 595 014 metric bundles, a 1.6% decrease from 42 264 441 metric bundles produced during 1997.

Available on CANSIM: matrices 32 and 122 (series 27).

The December 1998 issue of *Asphalt roofing* (45-001-XPB, \$7/\$62) will be available shortly. See *How to order publications*.

For more information, or to enquire about the concepts, methods, and data quality of this release, contact Don Grant (613-951-5998; grantdo@statcan.ca), Manufacturing, Construction and Energy Division. ■

Telephone statistics

November 1998

Canada's 14 major telephone systems reported monthly revenues of \$1,463.4 million in November, a 2.1% increase from November 1997. Operating expenses were down 2.8% from November 1997 to \$1,023.9 million. Net operating revenue totalled \$439.5 million, a 15.8% increase from November 1997.

Available on CANSIM: matrix 355.

The November 1998 issue of *Telephone statistics* (56-002-XIB, \$8/\$70) is now available on the Internet. 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. ■

PUBLICATIONS RELEASED

Gross domestic product by industry,
September 1998
Catalogue number 15-001-XPB
(Canada: \$15/\$145; outside Canada: US\$15/US\$145).

Field drop reporting series, Stocks of Canadian grain at December 31, 1998
Catalogue number 22-002-XPB
(Canada: \$15/\$88; outside Canada: US\$15/US\$88).

Non-metal mines, 1996
Catalogue number 26-224-XIB
(Canada: \$19; outside Canada: US\$19).

Production and disposition of tobacco products,
December 1998
Catalogue number 32-022-XPB
(Canada: \$7/\$62; outside Canada: US\$7/US\$62).

Telephone statistics, November 1998
Catalogue number 56-002-XIB
(Canada: \$8/\$70; outside Canada: US\$8/US\$70).

Electric power generating stations, 1997
Catalogue number 57-206-XPB
(Canada: \$30; outside Canada: US\$30).

Retail trade, November 1998
Catalogue number 63-005-XPB
(Canada: \$21/\$206; outside Canada: US\$21/US\$206).

All prices exclude sales tax.

Catalogue numbers with an -XIB or an -XIE extension are Internet versions; those with -XMB or -XME are microfiche; and -XPB or -XPE denote a paper version.

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MAJOR RELEASES

- **Urban transit, 1995** 2
Despite the emphasis on taking urban transit, Canadians are using it less and less. In 1995, each Canadian took an average of about 65 trips on some form of urban transit, the lowest level in the past 25 years.
- **Productivity, hourly compensation and unit labour cost, 1996** 4
Growth in productivity among Canadian businesses was notably weak again in 1996 accompanied by sluggish gains in employment and slow nominal growth during the year.

OTHER RELEASES

- **Help-wanted index, May 1997** 3
- **Short-term Expectations Survey** 3
- **Steel primary forms, week ending May 31, 1997** 13
- **Egg production, April 1997** 12

PUBLICATIONS RELEASED 11



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