

The Daily

Statistics Canada

Monday, January 22, 2001
For release at 8:30 a.m.

MAJOR RELEASES

- **Monthly Survey of Manufacturing, November 2000**
Rising prices in the refined petroleum and coal products industry led to a modest 0.3% increase in manufacturing shipments in November. Excluding the increase in refined petroleum and coal products, shipments were virtually unchanged from October.

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- **Retail trade, November 2000**
A partial rebound by retailers in the automotive sector pushed total retail sales up by 0.4% in November to \$23.4 billion. Overall spending in retail stores has been essentially unchanged since July.

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NEW PRODUCTS



MAJOR RELEASES

Monthly Survey of Manufacturing

November 2000

Rising prices in the refined petroleum and coal products industry led to a modest 0.3% increase in manufacturing shipments in November. Excluding the increase in refined petroleum and coal products, shipments were virtually unchanged from October.

The pace of growth in manufacturers' shipments continued to soften in November, as companies shipped \$45.7 billion in goods. Shipments increased in 16 of the 22 major groups, representing 51% of total shipments. Shipments were higher in six provinces and the territories.

According to the latest release of the Labour Force Survey, the manufacturing sector continued to produce jobs in December — 29,000 of them, leading all industries in new jobs for the month. After stalling in the third quarter, manufacturing employment grew by 2.9% in the fourth quarter of 2000.

Shipments edged up owing to increased price of crude oil

Higher prices and increased volumes were the main contributors as shipments in the refined petroleum and coal products industry in November rose 4.3% to \$3.1 billion. The Industrial Product Price Index reported that petroleum and coal product prices were 2.3% higher in November than in October.

Shipments in the fabricated metal products industry climbed 3.2% to \$2.4 billion, their highest level since March 2000. The November increase occurred largely in the fabricated structural metal products and the other metal fabricating products segments.

Total shipments in the automotive sector declined 1.6% to \$8.5 billion. However, parts and accessories accounted for the entire decrease; manufacturers increased their shipments of new vehicles.

In recent months, higher retail inventories and lower-than-expected demand have had less and less effect on the automotive sector. A number of motor vehicle manufacturers have announced their intention to curtail production at motor vehicle assembly plants by closing some plants temporarily, shortening employee work weeks and eliminating overtime.

As a result, automotive manufacturers have reduced orders to the motor vehicle parts and accessories industry. In November, this resulted in

Note to readers

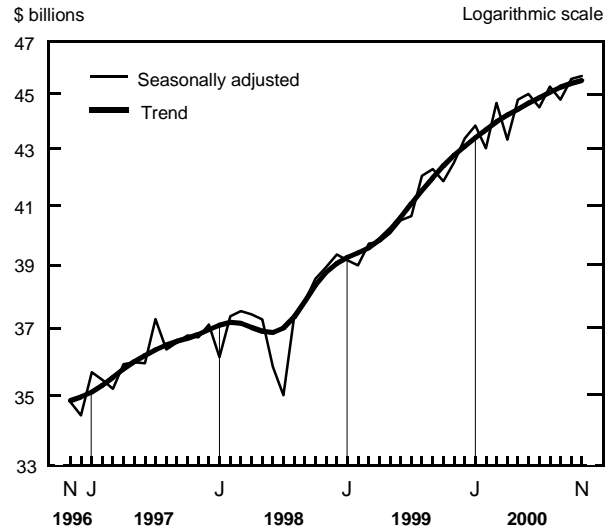
Unfilled orders are a stock of orders, which will contribute to future shipments assuming that the orders are not cancelled.

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 because portions of large contracts can be subcontracted out to manufacturers in other countries.

a 6.7% decrease in shipments of parts and accessories to \$2.6 billion, the lowest level since September 1998. However, shipments of new motor vehicles rose 0.9% in November, as manufacturers reduced finished product inventories by 14.4%.

Shipments edged up in November



Shipments, excluding the automotive sector, rose 0.7%.

The second largest decrease at the major group level was the electrical and electronic products industry, which shipped \$4.3 billion worth of goods, a 1.2% decline.

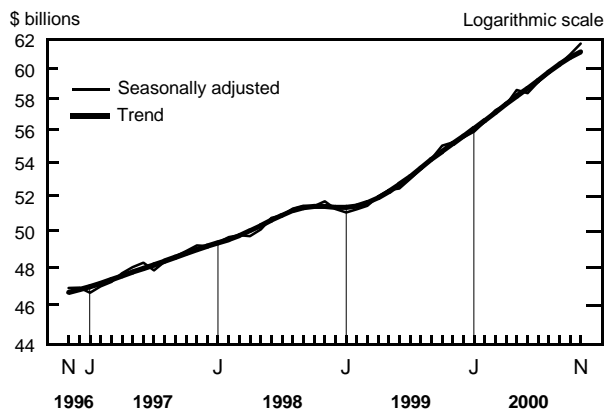
Shipments by province and the territories

	Oct. 2000	Nov. 2000	Oct. to Nov. 2000
seasonally adjusted			
	\$ millions		% change
Newfoundland	179	168	-5.8
Prince Edward Island	79	89	12.3
Nova Scotia	674	729	8.2
New Brunswick	895	937	4.6
Quebec	11,304	11,185	-1.1
Ontario	24,140	24,246	0.4
Manitoba	906	880	-2.9
Saskatchewan	617	626	1.4
Alberta	3,645	3,624	-0.6
British Columbia	3,124	3,193	2.2
Yukon, Northwest Territories and Nunavut	5	5	13.3

Aircraft and parts led climb in inventories

Manufacturers' inventories rose 1.2% in November to \$61.7 billion, as the trend in inventories continued to rise. The increase was largely in goods in process inventories (+1.8%) and finished products inventories (+1.5%).

Inventories continued to rise



A 5.8% jump in the aircraft and parts industry led November's overall climb in inventories. Increased activity in this industry has led to a jump in goods in process inventories, which have been increasing steadily since August 2000.

Lower shipments contributed to higher inventories in the electrical and electronic products industry (+3.6%) and the chemical products industry (+1.8%). In both industries, the increases were primarily in raw materials and finished products.

The major offsetting movements occurred in the railroad rolling stock (-6.1%) and motor vehicles (-5.4%) industries. Inventories fell in the motor vehicle industry, as manufacturers shipped from finished product inventories.

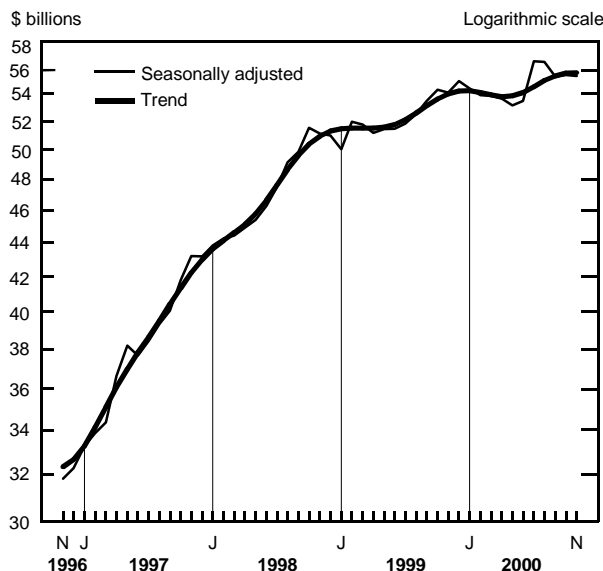
The inventory-to-shipments ratio increased to 1.35 in November from 1.34 in October. The inventory-to-shipments ratio has continued to edge up in recent months, and the trend in the ratio has also increased steadily since February 2000. The finished products-to-shipments ratio has remained stable.

Unfilled orders soften

Manufacturers' unfilled orders edged down 0.1% in November, returning to September's level of \$55.3 billion.

Manufacturers in the electrical and electronic products industry saw the largest decline in November orders, down 2.1% from October. The motor vehicle industry, led by a continued weak demand for heavy trucks, reported a November decline of 3.7%.

Unfilled orders were down



Offsetting movements were seen in the aircraft and parts industry, up 0.4%, and the primary metal industry, up 6.1%, as large contracts were received.

New orders slipped 0.1% in November, owing in large part to the transportation industry and in particular the motor vehicle parts and accessories industry. The machinery industry also contributed to the lower level of orders.

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

The November 2000 issue of the *Monthly Survey of Manufacturing* (31-001-XPB, \$20/\$196) will be available soon. See *How to order products*.

Data for shipments by province in greater detail than normally published may be available on request. For more information, or to enquire about the concepts, methods or data quality of this release, contact Russell Kowaluk (613-951-0600; kowarus@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 1999	42,491	1.6	55,200	0.4	54,071	-0.4	42,274	-0.9	1.30		
December 1999	43,359	2.0	55,520	0.6	54,938	1.6	44,227	4.6	1.28		
January 2000	43,834	1.1	55,876	0.6	54,393	-1.0	43,288	-2.1	1.27		
February 2000	43,003	-1.9	56,516	1.1	53,889	-0.9	42,500	-1.8	1.31		
March 2000	44,666	3.9	57,238	1.3	53,844	-0.1	44,620	5.0	1.28		
April 2000	43,310	-3.0	57,597	0.6	53,629	-0.4	43,096	-3.4	1.33		
May 2000	44,776	3.4	58,562	1.7	53,135	-0.9	44,282	2.8	1.31		
June 2000	45,002	0.5	58,347	-0.4	53,470	0.6	45,336	2.4	1.30		
July 2000	44,497	-1.1	59,095	1.3	56,452	5.6	47,479	4.7	1.33		
August 2000	45,282	1.8	59,678	1.0	56,395	-0.1	45,226	-4.7	1.32		
September 2000	44,785	-1.1	60,278	1.0	55,294	-2.0	43,684	-3.4	1.35		
October 2000	45,568	1.7	60,950	1.1	55,402	0.2	45,676	4.6	1.34		
November 2000	45,683	0.3	61,682	1.2	55,332	-0.1	45,613	-0.1	1.35		

Manufacturing industries except motor vehicle, parts and accessories

	Shipments		Inventories		Unfilled orders		New orders			
	seasonally adjusted									
	\$ millions	% change	\$ millions	% change	\$ millions	% change	\$ millions	% change		
November 1999	33,827	2.2	52,079	0.6	47,207	0.6	34,113	0.8		
December 1999	34,391	1.7	52,402	0.6	48,602	3.0	35,786	4.9		
January 2000	34,985	1.7	52,776	0.7	48,735	0.3	35,118	-1.9		
February 2000	34,584	-1.1	53,384	1.2	48,924	0.4	34,774	-1.0		
March 2000	35,773	3.4	54,047	1.2	49,565	1.3	36,413	4.7		
April 2000	34,991	-2.2	54,523	0.9	49,006	-1.1	34,432	-5.4		
May 2000	36,023	3.0	55,376	1.6	48,670	-0.7	35,687	3.6		
June 2000	36,182	0.4	55,180	-0.4	49,240	1.2	36,753	3.0		
July 2000	35,997	-0.5	55,881	1.3	52,077	5.8	38,834	5.7		
August 2000	36,617	1.7	56,302	0.8	52,451	0.7	36,991	-4.7		
September 2000	36,132	-1.3	56,900	1.1	51,581	-1.7	35,262	-4.7		
October 2000	36,948	2.3	57,554	1.1	51,966	0.7	37,333	5.9		
November 2000	37,198	0.7	58,335	1.4	51,995	0.1	37,227	-0.3		

Retail trade

November 2000

A partial rebound by retailers in the automotive sector pushed total retail sales up by 0.4% in November to \$23.4 billion. This follows a 0.7% decline in October. In constant dollars, sales were stable in November (-0.1%) compared with October. The only significant price increases in November were in the automotive sector.

Overall spending in retail stores has been essentially flat since July, after significant increases in May, June and July. Previously, retailers saw a period of volatile sales in the first four months of 2000, following a year of strong gains throughout 1999. Despite flat sales in recent months, the cumulative value of goods and services sold by retailers in the first 11 months of 2000 was 6.3% higher than in the same period of 1999. In comparison, the sales growth in 1999 for the same 11-month period was 5.4%.

Stores in the automotive sector (+1.6%) posted the largest sales increase in November, followed by weaker gains in drug stores (+0.5%) and furniture stores (+0.3%). General merchandise stores (-1.5%) and stores classified as other retail (-0.9%) posted declines in November, while sales were essentially unchanged in the food (+0.1%) and clothing (-0.1%) sectors. The other retail category includes liquor stores, sporting goods stores, hardware stores and bookstores.

decline, sales in this sector had increased in each of the previous five months, after a period of volatility at the start of the year. Prior to 2000, sales in this sector had been following a strong upward movement since the fall of 1998.

Sales by motor and recreational vehicle dealers, which represent about two-thirds of sales in the automotive sector, advanced 1.8% in November. The increase primarily resulted from higher prices of new model year vehicles. November's advance follows a 5.3% decline in October and nearly unchanged sales in September (-0.1%). Despite weaker sales gains in recent months and in the early months of 2000, motor and recreational vehicle dealers managed to show a 9.1% gain in cumulative sales for the first 11 months of 2000 compared with the same period of 1999. This strong performance by motor and recreational vehicle dealers came, in part, from significant sales gains in the spring and summer of 2000. Attractive financing offers and large cash rebates helped stimulate sales in this period.

Sales at gasoline service stations rose for the third consecutive month, up 1.9% in November. November sales were 21.8% above those reported in November 1999 and 49.7% above those of November 1998.

Consumers stayed away from department stores

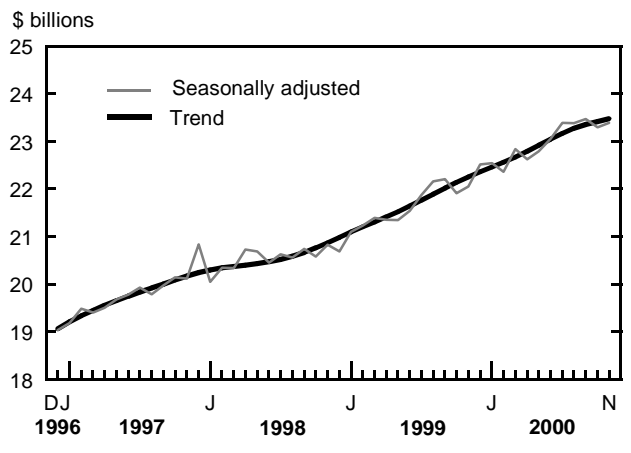
Weaker sales by department stores led to the November decline in the overall general merchandise sector (-1.5%). Consumer spending in department stores went down 3.3%, cancelling more than two-thirds of the gain (+4.9%) reported in October. The upward movement seen in department store sales since the spring of 2000 has faltered in the past few months. Previously, department store sales had been declining since September 1999, following a period of rising sales that lasted more than a year. Other general merchandise stores, also included in the sector, posted a 0.7% increase in sales in November, continuing the strong upward movement of the last four years.

Retailers in Central Canada posted weak sales

Retailers in Quebec (-1.2%) posted the only sales decline in November, and sales remained essentially unchanged in Ontario (+0.1%). Retail sales in Quebec and Ontario were down or showed little progress in most sectors. Retailers in the remaining provinces, except Manitoba (+0.5%), reported sales increases of at least 1.0% in November after significant declines in October.

In Quebec, overall spending in stores declined slightly in recent months after advancing strongly in June and July 2000. Retail sales in Quebec were

Retail sales have remained essentially flat since July



Auto sector recouped some losses

In November, retailers in the automotive sector (+1.6%) recouped slightly more than half the 2.9% loss in sales they reported in October. Prior to the October

volatile in the first half of 2000 after an 18-month period of generally increasing sales. Despite weaker sales in October and November, retail sales in Ontario have been generally increasing since the summer of 1996.

Related indicators for December

Total employment posted a fifth consecutive gain in December, up 0.2% compared with November. About 9 out of 10 jobs created in this five-month period were full-time. Preliminary figures from the automotive industry show that the number of new motor vehicles sold in December continued to recover from October's significant drop. Housing starts were down for a second consecutive month in December (-4.9%), marking the eighth monthly decline in 2000.

Available on CANSIM: matrices 2399 and 2400 (main matrices), 2299, 2397, 2398, 2401-2416 and 2418-2420.

The November 2000 issue of *Retail trade* (63-005-XIB, \$16/\$155; 63-005-XPB, \$21/\$206) will be available soon. See *How to order products*.

Retail sales estimates for December will be released on February 22.

To order data, or for general information, contact the Client Services Unit (1-877-421-3067; 613-951-3549; retailinfo@statcan.ca). For analytical information, or to enquire about the concepts, methods or data quality of this release, contact Paul Gratton (613-951-3541; gratpau@statcan.ca), Distributive Trades Division. □

Retail sales

	Nov. 1999	Aug. 2000 ^r	Sept. 2000 ^r	Oct. 2000 ^r	Nov. 2000 ^p	Oct. to Nov. 2000	Nov. to Nov. 2000
seasonally adjusted							
	\$ millions					% change	
Food	4,946	5,137	5,135	5,160	5,164	0.1	4.4
Supermarkets and grocery stores	4,574	4,756	4,756	4,781	4,790	0.2	4.7
All other food stores	371	381	379	379	375	-1.1	1.0
Drug and patent medicine stores	1,131	1,136	1,147	1,152	1,158	0.5	2.4
Clothing	1,198	1,255	1,297	1,279	1,279	-0.1	6.7
Shoe stores	128	132	136	135	131	-2.8	2.7
Men's clothing stores	129	132	130	126	119	-5.7	-7.7
Women's clothing stores	383	383	395	395	389	-1.4	1.6
Other clothing stores	558	609	636	623	639	2.5	14.5
Furniture	1,175	1,263	1,292	1,287	1,291	0.3	9.8
Household furniture and appliance stores	946	1,025	1,048	1,038	1,040	0.1	9.9
Household furnishings stores	230	239	245	248	251	1.1	9.4
Automotive	8,782	9,480	9,524	9,249	9,394	1.6	7.0
Motor and recreational vehicle dealers	5,877	6,313	6,306	5,974	6,083	1.8	3.5
Gasoline service stations	1,629	1,833	1,918	1,949	1,985	1.9	21.8
Automotive parts, accessories and services	1,276	1,334	1,300	1,326	1,326	0.0	3.9
General merchandise stores	2,446	2,611	2,571	2,645	2,604	-1.5	6.5
Retail stores not elsewhere classified	2,376	2,501	2,503	2,523	2,501	-0.9	5.2
Other semi-durable goods stores	710	739	738	737	724	-1.8	2.0
Other durable goods stores	588	631	629	631	640	1.5	8.8
All other retail stores not elsewhere classified	1,078	1,132	1,137	1,154	1,136	-1.6	5.4
Total, retail sales	22,054	23,383	23,469	23,296	23,389	0.4	6.1
Total excluding motor and recreational vehicle dealers	16,177	17,070	17,163	17,321	17,306	-0.1	7.0
Provinces and territories							
Newfoundland	359	380	377	375	379	1.0	5.6
Prince Edward Island	100	105	105	102	103	1.3	3.3
Nova Scotia	692	713	713	703	716	1.8	3.4
New Brunswick	561	583	583	571	585	2.6	4.3
Quebec	5,104	5,365	5,373	5,355	5,292	-1.2	3.7
Ontario	8,426	8,996	9,059	8,995	9,008	0.1	6.9
Manitoba	755	793	787	783	787	0.5	4.1
Saskatchewan	658	684	681	670	677	1.1	2.9
Alberta	2,503	2,684	2,704	2,676	2,714	1.4	8.4
British Columbia	2,822	3,004	3,011	2,986	3,050	2.1	8.1
Yukon	28	28	28	29	29	-0.6	4.1
Northwest Territories	31	33	33	34	33	-2.6	5.0
Nunavut	15	15	16	16	17	1.7	13.3

^r Revised figures.

^p Preliminary figures.

Retail sales

	Nov. 1999	Oct. 2000 ^r	Nov. 2000 ^p	Nov. 1999 to Nov. 2000
unadjusted				
	\$ millions			% change
Food	4,654	4,933	5,012	7.7
Supermarkets and grocery stores	4,306	4,568	4,652	8.0
All other food stores	348	365	361	3.5
Drug and patent medicine stores	1,116	1,143	1,157	3.7
Clothing	1,325	1,329	1,427	7.7
Shoe stores	140	146	145	3.2
Men's clothing stores	156	127	145	-7.2
Women's clothing stores	411	402	421	2.4
Other clothing stores	618	654	717	16.0
Furniture	1,307	1,315	1,420	8.7
Household furniture and appliance stores	1,046	1,056	1,127	7.7
Household furnishings stores	261	260	293	12.5
Automotive	8,519	8,999	9,110	6.9
Motor and recreational vehicle dealers	5,510	5,666	5,653	2.6
Gasoline service stations	1,581	1,998	1,960	23.9
Automotive parts, accessories and services	1,428	1,335	1,497	4.8
General merchandise stores	2,961	2,696	3,164	6.9
Retail stores not elsewhere classified	2,326	2,351	2,499	7.4
Other semi-durable goods stores	763	707	780	2.2
Other durable goods stores	557	548	633	13.6
All other retail stores not elsewhere classified	1,006	1,096	1,087	8.0
Total, retail sales	22,209	22,766	23,790	7.1
Total excluding motor and recreational vehicle dealers	16,698	17,099	18,137	8.6
Provinces and territories				
Newfoundland	377	363	398	5.7
Prince Edward Island	98	97	101	3.3
Nova Scotia	709	678	735	3.6
New Brunswick	569	557	595	4.5
Quebec	5,043	5,260	5,319	5.5
Ontario	8,627	8,739	9,327	8.1
Manitoba	760	769	797	4.9
Saskatchewan	667	675	689	3.3
Alberta	2,534	2,639	2,758	8.8
British Columbia	2,758	2,912	2,997	8.7
Yukon	25	27	26	3.5
Northwest Territories	29	32	31	8.7
Nunavut	14	17	16	13.6

^r Revised figures.

^p Preliminary figures.

OTHER RELEASES

Natural gas sales

November 2000 (preliminary)

Natural gas sales totalled 6 588 million cubic metres in November, up 12.1% over November 1999. Unusually cold weather throughout Canada resulted in higher sales to the residential (+14.6%) and commercial (+13.1%) sectors. Use by the industrial sector (including direct sales) rose 10.9% over November 1999, owing to higher use of natural gas for electricity generation and stronger demand by the chemical industry.

Year-to-date sales were up 8.0% over the same period in 1999. Industrial sector sales (including direct sales) continued to maintain strong growth, posting an 11.9% increase over the same period of 1999. Consumption by the residential sector increased 2.2%, but consumption by the commercial sector decreased 0.1%.

Natural gas sales

	Nov. 2000 ^P	Nov. 1999	Nov. 1999 to Nov. 2000
	thousands of cubic metres		% change
Natural gas sales	6 588 230	5 878 242	12.1
Residential	1 471 690	1 284 268	14.6
Commercial	1 060 334	937 515	13.1
Industrial	1 935 587	1 745 330	10.9
Direct	2 120 619	1 911 129	
	year-to-date		
	2000 ^P	1999	1999 to 2000
	thousands of cubic metres		% change
Natural gas sales	63 832 116	59 097 427	8.0
Residential	12 779 854	12 499 841	2.2
Commercial	8 998 624	9 008 493	-0.1
Industrial	20 282 517	18 571 247	11.9
Direct	21 771 121	19 017 846	

^P Preliminary figures.

Available on CANSIM: matrices 1052-1055.

The November 2000 issue of *Natural gas transportation and distribution* (55-002-XIB, \$13/\$125) will be available in February. See *How to order products*.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Gary Smallbridge (613-951-3567; smalgar@statcan.ca) or Tom Lewis (613-951-3596; talewis@statcan.ca), Manufacturing, Construction and Energy Division. ■

Railway carloadings

Seven-day period ending December 7, 2000

Non-intermodal traffic loaded during the seven-day period ending December 7 was 4.8 million metric tonnes, off 0.9 % from the same period of 1999. The number of cars loaded decreased 0.3 %.

Intermodal traffic totalled 457 000 tonnes, a 12.6 % increase from the same period of 1999. The year-to-date figures were down 8.8 % from the same period of 1999.

Total traffic increased 0.1 % during the period. This brought the year-to-date total to 209.8 million tonnes, a decrease of 12.7% from the same period of 1999.

All year-to-date figures have been revised.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Robert Larocque (613-951-2486, fax: 613-951-0009; laroque@statcan.ca), Transportation Division. ■

School bus industry

1999

Data for 1999 for the school bus industry are now available.

For more information, or to enquire about the concepts, methods or data quality of this release, contact J.R. Larocque (613-951-2486; fax: 613-951-0009; laroque@statcan.ca), Transportation Division. ■

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Statistics Canada

Thursday, June 9, 1997
For release at 9:30 a.m.

MAJOR RELEASES



- **Urban transit, 1996** 2
Despite the emphasis on taking urban transit, Canadians are using it less and less. In 1996, about Canadian took an average of about 45 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 relatively weak, despite their accompanied by sluggish gains in employment and slow economic growth during the year.

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PUBLICATIONS RELEASED

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