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The Daily

Statistics Canada

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MAJOR RELEASES

OTHER RELEASES

NEW PRODUCTS

INDEX: January 2001

MAJOR RELEASES

Quarterly Business Conditions Survey: Manufacturing Industries
January 2001

In January, manufacturers in the transportation equipment and primary metals industries expected to decrease production levels in the coming three months. Manufacturers were also concerned about current levels of orders and finished product inventories.

> ***Note to readers***
>
> *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 4,000 manufacturers and are weighted by a manufacturer's shipments or employment. Consequently, larger manufacturers have a correspondingly larger impact on the results than do smaller manufacturers.*
>
> *Data in this release are seasonally adjusted, except for the data on production difficulties.*

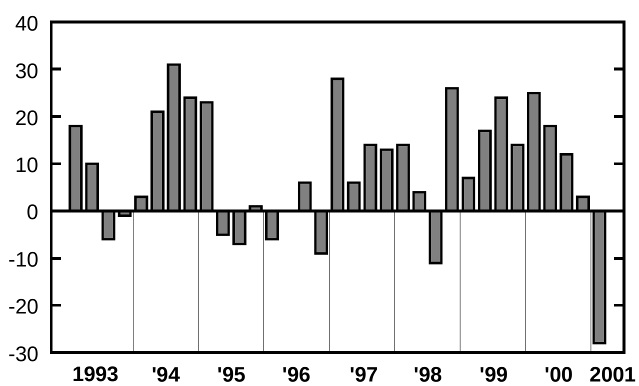
Manufacturers expect to decrease production

In January, 43% of manufacturers stated they would decrease production in the first quarter, while only 15% expected to increase production, leaving the balance of opinion at -28. This is the first negative balance seen since July 1998.

Manufacturers in the transportation equipment and primary metals industries accounted for almost all of the decrease. Recently, motor vehicle manufacturers announced measures to reduce production.

The balance of opinion of -28 was determined by subtracting the 43% of manufacturers who stated that production prospects for the coming three months would be lower from the 15% who said that prospects would be higher.

Balance of opinion for expected volume of production, next three months versus last three months



Manufacturers concerned about the level of orders received

Also dropping was the balance of opinion on the current level of orders received, which fell by 28 points to -34, as the number of manufacturers who stated that orders were declining increased to 48% in January from 18% in October. Again, manufacturers in the transportation equipment and primary metals industries were the major contributors to the decrease.

Greater concern with current level of unfilled orders

The balance of opinion concerning the current level of unfilled orders was -24 in January, as 35% of manufacturers said their level of unfilled orders was lower than normal and only 11% said it was higher than normal.

The major contributor to the decrease in the balance was the primary metals industry.

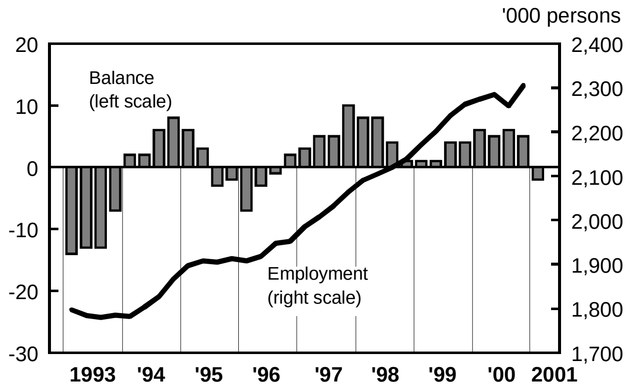
According to the November Monthly Survey of Manufacturers, the level of unfilled orders has decreased 2.0% from the July 2000 peak of $56.5 billion.

Employment prospects drop slightly

The balance of opinion for employment prospects for the next three months decreased 7 points to -2 in the January survey. The relatively large decline in production expectations and concerns with lower orders did not fully carry over into employment prospects. This was the first negative balance observed in the survey since October 1996. While 81% of manufacturers stated that they would keep or add to their work force, 19% indicated that they expected to decrease employment in the coming quarter. The primary metals industry was the major contributor to the decreasing balance.

According to the December Labour Force Survey, employment in manufacturing increased 29,000 in December and was 2.7% higher than in December 1999.

Balance of opinion on employment prospects during the next three months and manufacturing employment (Labour Force Survey)



Growing concern about finished products inventory

In the January Business Conditions Survey, some 31% of manufacturers said their the current level of finished products inventory was too high, up from 17% in October. This pushed the balance of opinion down 14 points to -28. The Monthly Survey of Manufacturers results for November show finished products inventories levels at almost $19.3 billion dollars, up from $18.8 in July 2000.

Few manufacturers report production impediments

In January, 78% of manufacturers reported little in the way of production impediments, down 2 points compared with the October survey results. A shortage of skilled labour continued to be a concern for 9% of manufacturers. Manufacturers reporting other production impediments passed from 4% in October to 7% in January. Some expressed concern over increasing energy prices and reduced demand.

Available on CANSIM: matrices 2843-2845.

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

Business Conditions Survey: Manufacturing industries

	January 2000	April 2000	July 2000	October 2000	January 2001
	seasonally adjusted				
Volume of production during next three months compared with last three months will be:					
About the same	47	54	62	65	42
Higher	39	32	25	19	15
Lower	14	14	13	16	43
Balance	25	18	12	3	-28
Orders received are:					
About the same	62	62	71	70	38
Rising	29	30	17	12	14
Declining	9	8	12	18	48
Balance	20	22	5	-6	-34
Present backlog of unfilled orders is:					
About normal	81	79	78	71	54
Higher than normal	11	12	10	8	11
Lower than normal	8	9	12	21	35
Balance	3	3	-2	-13	-24
Finished product inventory on hand is:					
About right	84	83	82	80	66
Too low	6	3	2	3	3
Too high[1]	10	14	16	17	31
Balance	-4	-11	-14	-14	-28
Employment during the next three months will:					
Change little	72	75	74	71	64
Increase	17	15	16	17	17
Decrease	11	10	10	12	19
Balance	6	5	6	5	-2
	unadjusted				
Sources of production difficulties:					
Working capital shortage	2	2	1	2	2
Skilled labour shortage	6	8	8	8	9
Unskilled labour shortage	1	2	2	2	2
Raw material shortage	2	2	2	3	4
Other difficulties	1	1	2	5	7
No difficulties	88	86	85	80	78

[1] *No evident seasonality.*

■

OTHER RELEASES

Domestic sales of refined petroleum products

Annual 2000 and December 2000 (preliminary)

Sales of refined petroleum products for the year 2000 were up 1.8% over 1999. Diesel fuel oil, other petroleum products and heavy fuel oil all posted significant increases in 2000. Diesel fuel oil posted the largest increase; sales reached 23.5 million cubic metres, a rise of 5.6% over 1999. Higher demand by the transportation sector and increased drilling activity in the oil and natural gas industry contributed to the rise in diesel fuel sales. Diesel accounted for 24.8% of total sales of petroleum products in 2000.

Sales in the other refined petroleum products category, which includes propane, butane, asphalt, lubricating oils, stove oil and petroleum coke, increased 2.8% to 9.5 million cubic metres. Heavy fuel oil sales rose 2.5% to 7.7 million cubic metres.

These three categories accounted for 42.8% of the total sales of refined petroleum products in 2000.

In response to the rising prices in 2000, drivers appear to be filling up less on premium grades of gasoline and opting for lower grades. Sales volumes for premium motor gasoline decreased by 23.0% and mid-grade plunged 25.8% during the year, while sales of regular non-leaded gasoline rose 4.6%. Sales of premium motor gasoline accounted for 9.1% of total sales in 2000, compared with 11.8% in 1999, while the share of mid-grade sales was 3.2%, down from 4.3% in 1999.

The increase of 2.2% for light fuel oil was mostly owing to colder temperatures in 2000 compared with 1999. Since 1990, sales of light fuel oil have dropped by 22.0%, which is attributable to increased use of natural gas for heating.

Sales of refined petroleum products totalled 8.4 million cubic metres in December, an increase of 3.7% from December 1999. Sales of light fuel oil grew 21.5% and heavy fuel oil sales were up 12.3% from December 1999. The advance in heavy fuel oil sales reflects higher usage of the product by utilities for electricity generation.

Total motor gasoline sales were down 0.8% in December 2000 compared with December 1999. Sales of regular non-leaded motor gasoline rose 1.6%, but sales of premium dropped 15.1% and mid-grade fell back 15.4%.

Sales of refined petroleum products

	Dec. 1999[r]	Dec. 2000[p]	Dec. 1999 to Dec. 2000
	thousands of cubic metres		% change
Total, all products	**8 085.7**	**8 388.4**	**3.7**
Motor gasoline	3 299.9	3 273.7	-0.8
Diesel fuel oil	1 842.1	1 911.7	3.8
Light fuel oil	592.7	720.0	21.5
Heavy fuel oil	798.6	896.5	12.3
Aviation turbo fuels	519.1	494.2	-4.8
Petrochemical feedstocks[1]	419.8	377.2	-10.1
All other refined products	613.5	715.2	16.6
	Jan. to Dec. 1999[r]	Jan. to Dec. 2000[p]	Jan.–Dec. 1999 to Jan.–Dec. 2000
Total, all products	**93 318.1**	**94 966.9**	**1.8**
Motor gasoline	38 322.4	38 324.8	0.0
Diesel fuel oil	22 259.3	23 511.8	5.6
Light fuel oil	4 895.4	5 003.1	2.2
Heavy fuel oil	7 484.6	7 675.0	2.5
Aviation turbo fuels	6 255.3	6 390.7	2.2
Petrochemical feedstocks[1]	4 885.3	4 583.9	-6.2
All other refined products	9 215.8	9 477.4	2.8

r Revised data.
p Preliminary data.
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.

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 Gerry Desjardins (613-951-4368; *desjger@statcan.ca*), Manufacturing, Construction and Energy Division. ■

Steel primary forms

Week ending January 27, 2001 (preliminary)

Steel primary forms production for the week ending January 27 totalled 266 558 metric tonnes, down 3.6% from 276 543 tonnes a week earlier and down 16.3% from 318 595 tonnes in the same week of 2000. The year-to-date total at the end of the reference week was 1 037 079 tonnes, a 18.4% decrease compared with 1 270 302 tonnes for the same period in 2000.

For more information, or to enquire about the concepts, methods, or data quality of this release, contact Jean-Marie Houle (613-951-4925; *houlejm@statcan.ca*), Manufacturing, Construction and Energy Division. ■

Railway carloadings
Seven-day period ending December 21, 2000

Non-intermodal traffic loaded during the seven-day period ending December 21 was 4.6 million metric tonnes, down 1.5% from the same period of 1999. The number of cars loaded was down 1.1%.

Intermodal traffic tonnage was 399 000 tonnes, down 0.6% from the same period of 1999. The year-to-date figures were down 8.1%.

Total traffic decreased 1.5% during the period. This brought the year-to-date total to 220.0 million tonnes, a decrease of 12.3 % 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. ■

Social policy simulation database and model

The *Social policy simulation database and model Version 8.1*, based on 1996 microdata, is now available. The SPSD/M is a static microsimulation model. It is comprised of a database, a series of tax/transfer algorithms and models, analytical software and user documentation. Since 1985, the SPSD/M has been produced as an occasional product. It has been in wide use by policy analysts in Canada studying virtually every change to the tax and transfer system since that time.

The SPSD/M is a tool designed to analyse the financial interactions of governments with individuals and families in Canada. It allows estimation of the income redistributive effects or cost implications of changes in the personal taxation and cash transfer system. The SPSD/M helps researchers examining the potential impacts of changes in taxes, earnings, demographic trends and a wide range of other factors. It can be used to study federal and provincial tax and transfer changes from 1984 through 2005.

The SPSD/M allows users to answer "what-if" questions. For example, if there were a change to the taxes Canadians paid or transfers they received – who would gain and who would lose? Would single-parent households in a particular province be better off? By how much? How much extra money would federal or provincial governments collect or pay out?

Social policy simulation database and model Version 8.1 (89F0002XCB, $5,000/$12,500) is now available on CD-ROM. See *How to order products*.

To order this product, or for more information, contact Brian Murphy (613-951-3769; *spsdm@statcan.ca*), Social and Economic Studies Division. ■

Real estate rental and leasing and property management service industry
1998

Data on the real estate rental and leasing and property management service industry (NAICS 5311 and 53131) are now available for 1998.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Jean Hamilton (613-951-7358), Service Industries Division. The statistics will be available on CANSIM at a later date. ■

Retail Chain and Department Stores Survey
1998

Retail chain and department stores is now available. Included in the publication is a paper entitled "Changes in outputs of annual retail trade surveys." The first objective of the paper is to inform retail data users, industry analysts, trade associations and other stakeholders about these changes to outputs of annual retail trade surveys. The second is to seek input from stakeholders on possible data products that could result from these changes.

Changes in outputs of annual retail trade surveys (63F0022XIE, free) can be downloaded from Statistics Canada's Web site (*www.statcan.ca*). From the *Products and services* page, choose *Research papers (free)*, then *Trade*.

The 1998 issue of *Retail chain and department stores* (63-210-XIB, $30) is now available. See *How to order products*.

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 Augustine Akuoko-Asibey (613-951-7330; *augustine.akuoko-asibey@statcan.ca*), Distributive Trades Division. ■

NEW PRODUCTS

Female employment rates and labour market attachment in rural Canada,
Catalogue number 11F0019MIE00153
(Free).

Female employment rates and labour market attachment in rural Canada,
Catalogue number 11F0019MPE00153 ($5).

Coal and coke statistics, November 2000
Catalogue number 45-002-XIB ($9/$85).

Electric power statistics, November 2000
Catalogue number 57-001-XIB ($9/$85).

Quarterly financial statistics for enterprises, Third quarter 2000
Catalogue number 61-008-XPB ($35/$114).

Changes in outputs of annual retail trade surveys,
Catalogue number 63F0022XIE
(Free).

Retail chain and departement stores, 1998
Catalogue number 63-210-XIB ($30).

Social policy simulation database and model, 1996
Catalogue number 89F0002XCB ($5,000/$12,500).

All prices are in Canadian dollars and exclude sales tax. Additional shipping charges apply for delivery outside Canada.

Catalogue numbers with an -XIB or an -XIE extension are Internet versions; those with -XMB or -XME are microfiche; -XPB or -XPE are paper versions; -XDB are electronic versions on diskette and -XCD are electronic versions on compact disc.

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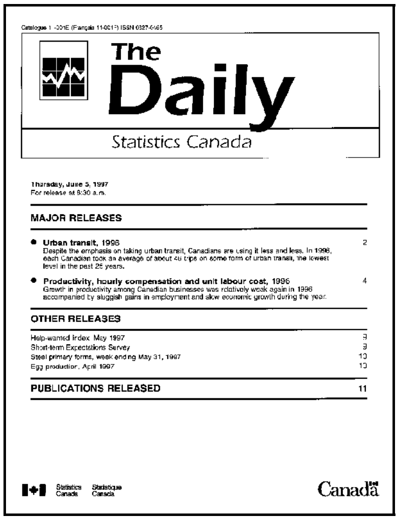
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MAJOR RELEASES

- **Urban transit, 1996** 2
  Despite the emphasis on taking urban transit, Canadians are using it less and less. In 1996, each Canadian took an average of about 46 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 again in 1996 accompanied by sluggish gains in employment and slow economic growth during the year.

OTHER RELEASES

Help-wanted Index, May 1997	9
Short-term Expectations Survey	9
Steel primary forms, week ending May 31, 1997	10
Egg production, April 1997	10

PUBLICATIONS RELEASED 11

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INDEX

January 2001

Subject	Reference period	Release date
1997 geography catalogue	1996 Census	January 25, 2001
Air charter statistics	First quarter 2000	January 9, 2001
Air travel between Canada and the United States	Second quarter 1999	January 10, 2001
Asphalt roofing	November 2000	January 9, 2001
	December 2000	January 24, 2001
Building permits	November 2000	January 11, 2001
Canada's international transactions in securities	November 2000	January 24, 2001
Canadian economic observer	January 2001	January 18, 2001
Canadian international merchandise trade	November 2000	January 19, 2001
Canadian potato production	2000	January 19, 2001
Canadian Vehicle Survey	Second quarter 2000	January 11, 2001
Cement	November 2000	January 9, 2001
Cereals and oilseeds review	November 2000	January 29, 2001
Civil aviation financial statistics	Third quarter 2000	January 8, 2001
Civil aviation operating statistics	October 2000	January 12, 2001
Coal and coke statistics	November 2000	January 31, 2001
Coal production	2000	January 30, 2001
Composite Index	December 2000	January 24, 2001
Construction type plywood	November 2000	January 25, 2001
Construction Union Wage Rate Index	December 2000	January 18, 2001
Consumer Price Index	December 2000	January 18, 2001
Crude oil and natural gas	October 2000	January 4, 2001
	November 2000	January 30, 2001
Crushing statistics	December 2000	January 15, 2001
Dairy statistics	November and December 2000	January 15, 2001
Deliveries of major grains	December 2000	January 24, 2001
Department store sales and stocks	November 2000	January 5, 2001
Domestic sales of refined petroleum products	November 2000	January 5, 2001

INDEX: January 2001

Subject	Reference period	Release date
Domestic travel	First and second quarter 2000	January 15, 2001
Egg production	November 2000	January 8, 2001
Electric lamps	Fourth quarter 2000	January 26, 2001
Electric power selling price indexes	September to December 2000	January 30, 2001
Electric power statistics	November 2000	January 31, 2001
Employment Insurance	November 2000	January 24, 2001
Employment, earnings and hours	November 2000	January 30, 2001
Estimates of labour income	October 2000	January 5, 2001
Export and import price indexes	November 2000	January 19, 2001
Farm business cash flows	1997 to 1999	January 19, 2001
Farm product prices	January to November 2000	January 11, 2001
Financial performance indicators for Canadian business	1999	January 23, 2001
	1999	January 30, 2001
Full-time enrolment in trade/vocational and preparatory/special training	1997/98	January 30, 2001
Government expenditures on culture	1998/99	January 25, 2001
Grain stocks	December 31, 2000	January 31, 2001
Gross domestic product at factor cost by industry	November 2000	January 31, 2001
Hate crime	1999	January 24, 2001
Industrial chemicals and synthetic resins	November 2000	January 10, 2001
Industrial monitor on CD-ROM	January 2001	January 10, 2001
Industrial product and raw materials price indexes	November 2000	January 4, 2001
	December 2000	January 30, 2001
Internet by cable	1999	January 17, 2001
Labour Force Survey	December 2000	January 5, 2001
Light bulbs and tubes	December 2000	January 26, 2001
Local government enterprises, income and expenses	Fiscal year ended nearest to December 31, 1998	January 24, 2001
Low-income cutoffs for 1999 and low-income measures for 1998		January 10, 2001
Mental health statistics	1996/97 and 1997/98	January 17, 2001
Mineral wool including fibrous glass insulation	December 2000	January 23, 2001
Monthly railway carloadings	October 2000	January 17, 2001
	November 2000	January 24, 2001
Monthly Survey of Large Retailers	November 2000	January 24, 2001
National tourism indicators	Third quarter 2000	January 9, 2001
New census module on the Web site		January 15, 2001
New Housing Price Index	November 2000	January 12, 2001
New motor vehicle sales	November 2000	January 15, 2001
Oil and gas extraction	2000	January 30, 2001

INDEX: January 2001