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The Daily

Statistics Canada

Tuesday, February 4, 2003
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MAJOR RELEASES

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MAJOR RELEASES

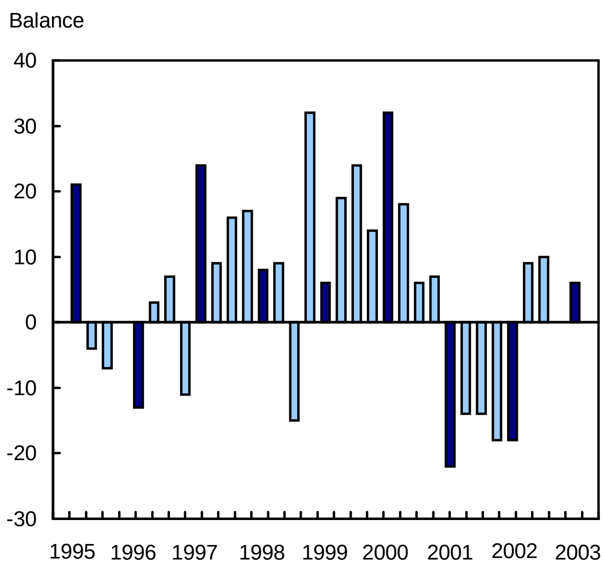
Business Conditions Survey: Manufacturing industries

January 2003

Although opinions on production prospects improved slightly, the mood among manufacturers continued to be guarded in January, as producers indicated some lower satisfaction with the levels of new and unfilled orders for the first quarter.

The voluntary survey, to which almost 4,000 manufacturers responded, requests opinions on production impediments, finished product inventory levels, new and unfilled order levels, and production and employment prospects in the coming three months.

Balance of opinion for expected volume of production next three months vs last three months



Manufacturers positive about production prospects

About 54% of manufacturers indicated that production prospects for the first quarter would remain about the same, down 12 percentage points from October's survey. With 26% indicating production would rise and 20% calling for a drop in output prospects, the balance of opinion stood at +6. This was a 6-point improvement from October's survey. Fifteen of the 21 major industry groupings indicated a more positive outlook for the first quarter of 2003. Producers in the transportation equipment, petroleum and coal products, and plastics and rubber products industries were the major contributors to January's increase in the balance of opinion.

The balance of opinion is determined by subtracting the proportion of manufacturers that stated production would decrease in the coming three months from the proportion who stated production would be increasing.

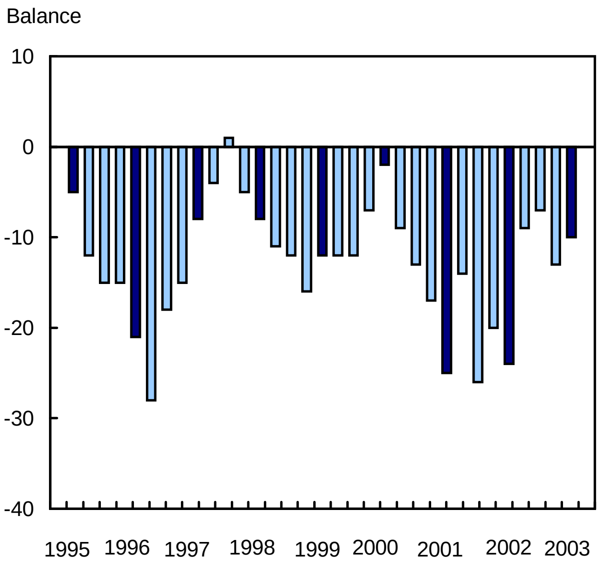
> ***Note to users***
>
> *The Business Conditions Survey has adopted the North American Industry Classification System (NAICS) for its 2003 reference year; previous years' data have been recalculated to the new classification system back to 1992. Detailed NAICS estimates are now available on CANSIM.*
>
> *Developed by the statistical agencies of Canada, Mexico and the United States, NAICS is designed to provide a common statistical framework and common definitions of the industrial structure of the three countries. The new classification facilitates the analysis and improves the comparability of the three countries' data.*
>
> *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 smaller manufacturers.*
>
> *Except for the data on production difficulties, data in this release are seasonally adjusted.*

Finished product inventories do not appear to be a concern

In January, 80% of manufacturers reported that the current level of finished product inventory was about right. However, 15% of manufacturers stated that inventories were too high and 5% said inventories were too low, leaving the balance of opinion at -10, up 3 points from October.

According to November's Monthly Survey of Manufacturing, finished product inventories posted a 2.3% increase to $19.8 billion, their highest level in 2002.

Balance of opinion for current level of finished-product inventory on hand



Manufacturers still satisfied with level of orders received

In January, 82% of manufacturers indicated that orders received were about right or increasing. With 21% of manufacturers indicating increasing levels of orders received and 18% stating lower levels of orders received, the balance of opinion stood at +3, down 6 points from October.

More concern with the backlog of unfilled orders

Some 20% of manufacturers indicated that the level of unfilled orders was lower than normal and 8% reported higher-than-normal levels. The resulting balance of opinion lost 2 points from October to -12. Nevertheless, the proportion of manufacturers indicating that the current level of unfilled orders was higher than normal or about right stood at a respectable 80% in January.

Producers in the primary metals and fabricated metal product and machinery manufacturing industries were the major contributors to the decreased balance.

According to the Monthly Survey of Manufacturing, unfilled orders in November stood at $46.9 billion, down 2.1% from November 2001.

Employment prospects in manufacturing remain stable

Some 85% of manufacturers indicated that their employment level would change little or increase in the coming three months, a result similar to what was observed in the previous three surveys.

According to December's Labour Force Survey, employment in manufacturing has risen 125,000 (+5.6%) since the beginning of 2002, returning employment in this sector to the peak reached in December 2000.

With 13% expecting employment to increase and 15% expecting it to decrease, January's balance of opinion for employment prospects stood at -2, unchanged from the previous three surveys.

Manufacturers report little change in production impediments

About 82% of manufacturers reported little in the way of production impediments in January, down 2 percentage points from October. The proportion reporting a shortage of skilled labour increased 1 point to 7%. A shortage of unskilled labour was reported by 2% of manufacturers.

Available on CANSIM: tables 302-0007 and 302-0008.

Information on methods and data quality available in the Integrated Meta Data Base: survey number 2152.

For general information or to order data, contact the dissemination officer (1-866-873-8789; 613-951-9497; fax: 613-951-9499; *manufact@statcan.ca*). To enquire about the concepts, methods or data quality of the release, contact Claude Robillard (613-951-3507; *claude.robillard@statcan.ca*), Manufacturing, Construction and Energy Division.

□

Business Conditions Survey: Canadian Manufacturing industries

	January 2002	April 2002	July 2002	October 2002	January 2003
	Seasonally adjusted				
Volume of production during next three months compared with last three months will be:					
About the same (%)	60	55	69	66	54
Higher (%)	11	27	20	17	26
Lower (%)	29	18	10	17	20
Balance	-18	9	10	0	6
Orders received are:					
About the same (%)	55	57	60	55	61
Rising (%)	13	25	22	27	21
Declining (%)	32	17	18	18	18
Balance	-19	8	4	9	3
Present backlog of unfilled orders is:					
About normal (%)	69	68	70	74	72
Higher than normal (%)	6	13	14	8	8
Lower than normal (%)	25	19	16	18	20
Balance	-19	-6	-2	-10	-12
Finished product inventory on hand is:					
About right (%)	69	80	80	78	80
Too low (%)	3	5	6	5	5
Too high[1] (%)	27	15	14	18	15
Balance	-24	-10	-8	-13	-10
Employment during the next three months will:					
Change little (%)	73	74	72	72	72
Increase (%)	9	12	13	13	13
Decrease (%)	18	14	15	15	15
Balance	-9	-2	-2	-2	-2
	Unadjusted				
	%				
Sources of production difficulties:					
Working capital shortage	3	2	2	2	3
Skilled labour shortage	4	5	7	6	7
Unskilled labour shortage	1	1	2	4	2
Raw material shortage	2	2	3	2	4
Other difficulties	5	3	2	3	3
No difficulties	84	86	83	84	82

1 *No evident seasonality.*

■

OTHER RELEASES

Placement of hatchery chicks and turkey poults
December 2002 (preliminary)

Placements of hatchery chicks onto farms were estimated at 58.6 million birds in December, down 1.5% from December 2001. Placements of turkey poults on farms decreased 10.6% to 1.2 million birds.

Available on CANSIM: table 003-0021.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Sandra Gielfeldt (613-951-2505; *sandy.gielfeldt@statcan.ca*), Agriculture Division. ■

NEW PRODUCTS

Gross domestic product by industry, November 2002, Vol. 16, no. 11
Catalogue number 15-001-XIE ($11/$110).

Employment, earnings and hours, November 2002, Vol. 80, no. 11
Catalogue number 72-002-XIB ($24/$240).

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 -XCB are electronic versions on compact disc.

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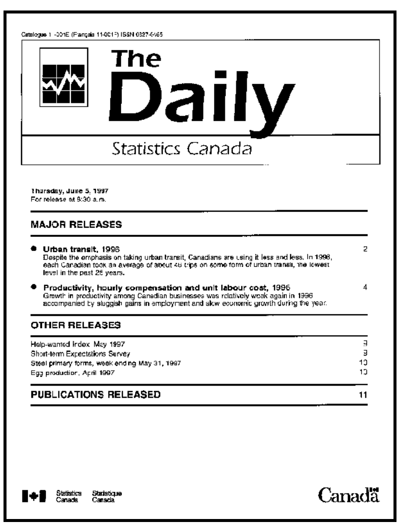
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Statistics Canada

Thursday, June 5, 1997
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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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