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MAJOR RELEASES

- **Monthly Survey of Manufacturing, March 2003**

A boost in motor vehicle manufacturing, coupled with a price-driven rise of shipments of petroleum and coal products, contributed to a 1.4% increase in manufacturing shipments in March. Shipments rose to \$44.7 billion, the highest level since November 2000.

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- **Insights on the New Economy: Information and communications technology and science-based industries, 1981 to 1997**

Information and communications technology industries have dynamic output, employment and productivity characteristics, but they are not the only source of growth in Canada's high-tech economy, according to a new study.

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MAJOR RELEASES

Monthly Survey of Manufacturing

March 2003

A boost in motor vehicle manufacturing, coupled with a price-driven rise in shipments of petroleum and coal products, contributed to a 1.4% increase in manufacturing shipments in March. Shipments rose to \$44.7 billion, the highest level since November 2000.

Despite global uncertainty in the wake of the war in Iraq and the tenuous state of the US economy, the Canadian manufacturing sector held its own in recent months. Manufacturers posted a 2.2% increase in shipments in the first quarter, more than enough to compensate for the 0.9% decline in the fourth quarter of 2002. Since the sharp downturn in manufacturing activity during 2001, Canadian manufacturers have reported higher shipments in four of the last five quarters.

The majority of manufacturing industries increase in March

Of the 21 manufacturing industries, representing 65% of total shipments, 13 reported increases in March. The non-durable and durable goods sectors were both up. Soaring petroleum shipments contributed to a 1.6% rise among non-durable goods manufacturers, the fourth increase in a row. Motor vehicle manufacturing boosted shipments of durable goods by 1.2% to \$25.1 billion.

Ontario and Alberta lead all provinces

Ontario led the seven provinces and all territories that reported higher shipments in March. Manufacturers of motor vehicles and petroleum and coal products contributed to a \$559 million increase (+2.4%) in shipments. Ontario, Canada's key manufacturing province, reported shipments of \$23.9 billion in March.

Alberta's manufacturers posted a \$115.7 million (+3.0%) increase in shipments. Machinery and fabricated metal products industries contributed to the fifth consecutive monthly gain in shipments for the province. New Brunswick rounded out the top three provinces. Shipments were up \$94.5 million (+8.5%) to \$1.2 billion in March.

Manufacturers apprehensive about the second quarter

Despite the strength of the Canadian manufacturing sector in the first quarter, there are some underlying

Note to readers

In addition to current-month estimates, data for the previous three months are regularly revised. Factors influencing revisions include late receipt of company data, incorrect information reported earlier, replacement of estimates with actual figures (once available), and seasonal adjustments. Consult the appropriate CANSIM tables for revised data.

***Non-durable goods industries** include food, beverage and tobacco products, textile mills, textile product mills, leather and allied products, paper, printing and related support activities, petroleum and coal products, chemicals and plastic and rubber products.*

***Durable goods industries** include clothing, wood products, non-metallic mineral products, primary metals, fabricated metal products, machinery, computer and electronic products, electrical equipment, appliance and components, transportation equipment, furniture and related products, and miscellaneous manufacturing.*

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

***New orders** are those 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. Readers should take note that the month-to-month change in new orders may be volatile. This will happen particularly if the previous month's change in unfilled orders is closely related 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.

concerns. Record high petroleum and coal product prices, which contributed to the advance in manufacturing shipments during the first quarter, have since fallen significantly. As well, fluctuations in the motor vehicle industry have been a key influence. Waning consumer demand for motor vehicles in the United States and Canada and rising retail inventories have contributed to the recent volatility of the sector.

Excluding the motor vehicle and parts industries and the petroleum and coal products industry, shipments increased a more modest 0.3% in March.

Global uncertainty and the recent surge in the value of the Canadian dollar have contributed to additional unease among manufacturers. According to April's quarterly Business Conditions Survey, manufacturers were concerned with lower levels of orders and future production. In April, 31% of manufacturers stated that they anticipated decreasing production during the

second quarter, and 26% said their levels of unfilled orders were lower than normal.

Shipments by province and territory

	Feb. 2003	March 2003	Feb. 2003 to March 2003
Seasonally adjusted			
	\$ millions		% change
Newfoundland and Labrador	173	177	2.4
Prince Edward Island	107	111	4.0
Nova Scotia	770	785	1.9
New Brunswick	1,107	1,201	8.5
Quebec	10,383	10,219	-1.6
Ontario	23,295	23,854	2.4
Manitoba	998	977	-2.1
Saskatchewan	604	613	1.6
Alberta	3,821	3,937	3.0
British Columbia	2,826	2,814	-0.4
Yukon, Northwest Territories and Nunavut	5	6	21.1

In March, unfilled orders fell 0.4% to \$42.9 billion. This was the seventh consecutive decline and the longest series of monthly decreases of unfilled orders since 1990-1991.

Factory jobs lost

Employment in manufacturing continued to weaken in April, down 0.3%. This followed a sharp decline in March (-1.6%). According to the latest release of the Labour Force Survey, manufacturers have cut 38,000 (-1.6%) jobs since the start of the year. The largest declines in the first four months of 2003 were in computer and electronic products. On the positive side, offsetting employment gains were reported in motor vehicle and parts manufacturing from January to April.

Automakers boost manufacturing in March

The motor vehicle industry, subject to considerable variation in recent months, reported a 6.2% jump in shipments in March. Shipments rose to \$5.7 billion, the highest level since the summer of 2002. This is a reversal of February's drop (-2.5%), and was preceded by soaring shipments in January (+15.9%). Some manufacturers noted that they had increased production levels in order to build up stock of new models.

The trend for shipments of motor vehicles returned to the positive side in March for the first time since July 2002.

Prior to the first quarter of 2003, there had been a general deceleration in motor vehicle manufacturing during the later half of 2002. Higher retail inventories and heightened uncertainty regarding the sustainability of demand in 2003 contributed to the sharp slowdown in manufacturing of motor vehicles in the fourth quarter

of 2002. According to the latest release of new motor vehicle sales for March, sales declined 4.4% following large monthly fluctuations in February (+14.0%) and January (-14.6%).

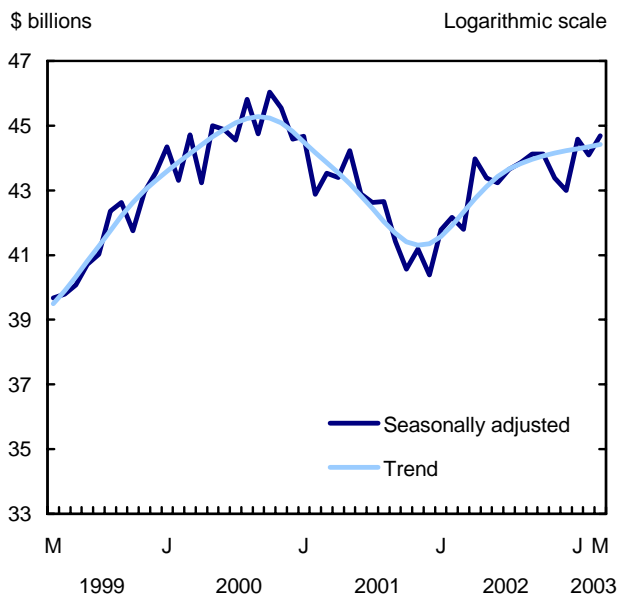
Petroleum and coal product manufacturers post record high shipments

Rising prices continued to push petroleum and coal product shipments to record levels. Shipments jumped 5.5% to \$3.6 billion in March and are now up more than 25% since November.

Petroleum prices increased 1.8% in March, and have soared 20% during the first three months of 2003. The start of the war in Iraq coupled with a colder-than-normal winter in North America, contributed to international concerns for adequate supplies of petroleum products.

The paper and machinery industries also contributed to higher shipments in March. Paper shipments rose 3.0% to \$2.8 billion. Manufacturers of machinery posted a 2.5% rise in shipments to \$2.0 billion, the highest level since October. Decreases in shipments of wood products (-4.2%) and primary metals (-2.0%) partly offset some of the increase in total shipments in March.

Manufacturers shipments recover in March



Manufacturers' inventories continue to accumulate

Following a 0.8% gain in February, manufacturers' inventories increased an additional 0.4% in March.

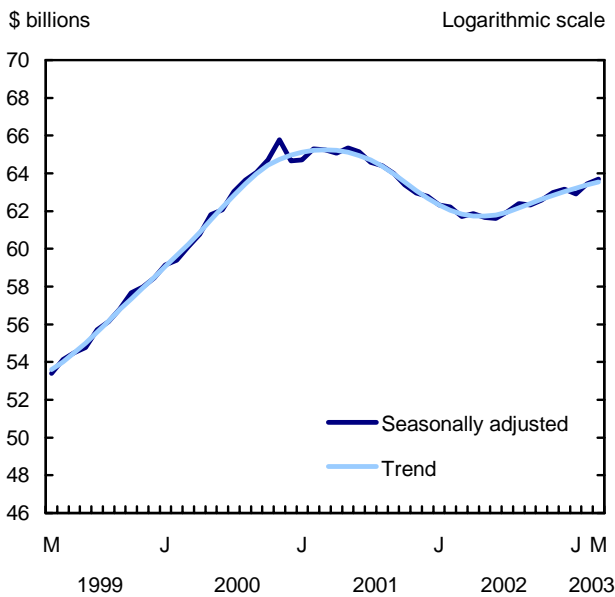
Inventories stood at \$63.7 billion, the highest level in 18 months. The trend for inventories has been positive for ten consecutive months.

Finished-product inventories highest since June 2001

Finished-product inventories increased 1.0% to \$20.0 billion in March, just short of June 2001's peak of \$20.2 billion. The accumulation of finished-product inventories in recent months may be a sign of weakening demand, partly the result of ongoing economic uncertainty of Canada's largest trading partner, the United States.

Raw material inventories also increased in March, up 0.5% to \$27.8 billion. Manufacturers reduced goods-in-process inventories by 0.4% to \$15.9 billion, the third decrease in four months.

Inventories hit 18-month high



The main contributors to March's increase in inventories were the chemical products and wood products industries. Inventories of chemical products climbed 2.1% to \$5.9 billion. In recent months, pharmaceutical and chemical fertilizer manufacturers have been increasing stock to meet product demand. Higher industrial prices for chemical and petroleum products also boosted the value of chemical inventories.

A gradual slowdown in construction of new housing, coupled with falling industrial prices, contributed to a build-up of wood product inventories in 2003. Inventories

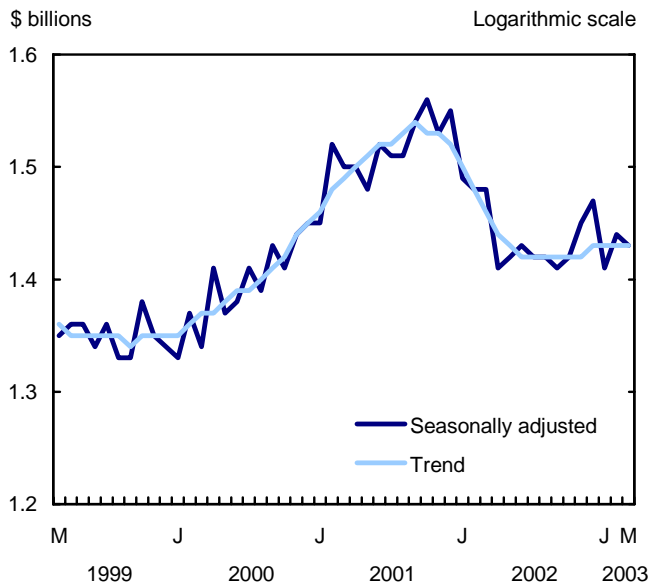
increased 2.1% to \$4.6 billion, the highest level since October 2001.

Higher shipments contribute to a lower inventory-to-shipment ratio

The inventory-to-shipment ratio settled back to 1.43 in March from 1.44 in February. March's increase in shipments outpaced the 0.4% rise in inventories, contributing to the lower ratio.

The finished-product inventory-to-shipment ratio remained stable at 0.45 in March, the result of comparable increases in both shipments and finished-product inventories. The ratio is a measure of the time that would be required in order to exhaust finished-product inventories if shipments were to remain at their current level.

The inventory-to-shipment ratio edges back in March



Fewer unfilled orders for aerospace products pull down total manufacturing

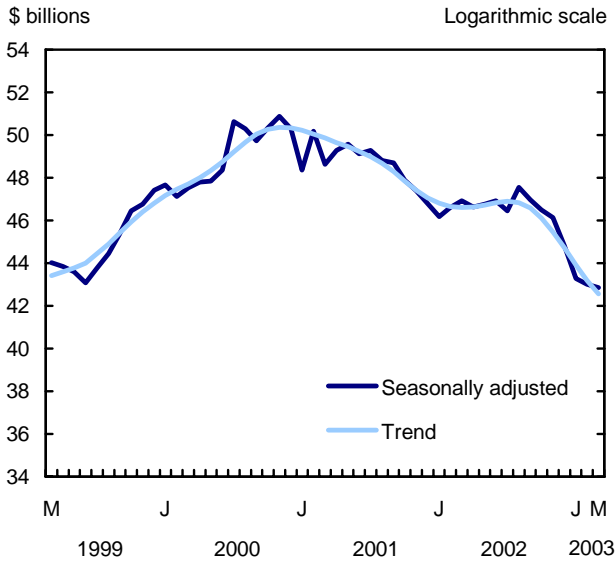
In March, Canadian manufacturers reported the seventh consecutive decline in unfilled orders. Orders decreased 0.4% to \$42.9 billion, the lowest level since January 1999. Ongoing weakness in the global aviation sector was partly responsible for the decline. Excluding the aerospace products and parts industry, unfilled orders improved by 0.7% in March.

Manufacturers of aerospace products and parts reported a 2.5% drop in orders to \$13.8 billion, the

lowest level in more than four years. The threat of terrorism, the war in Iraq and a significant downturn in business travel have all contributed to the persistent slump in the aerospace products and parts industry.

Unfilled orders increased in the machinery (+6.5%) and the plastics and rubber products industries (+10.0), partly offsetting the overall decrease in March.

Unfilled orders decrease for the seventh consecutive month



New orders rise for the third month in a row

In March, new orders rose to their highest level since August 2002. Manufacturers reported \$44.5 billion worth of new orders on their books in March, up 1.6% from February. Motor vehicles, computers and plastic and rubber products industries were the top contributors.

Available on CANSIM: tables 304-0014 and 304-0015.

Information on methods and data quality available in the Integrated Meta Data Base: survey number 2101.

The March 2003 issue of the *Monthly Survey of Manufacturing* (31-001-XIB, \$15/\$147) 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.

All data are benchmarked to the *1998 Annual Survey of Manufactures*.

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 Russell Kowaluk (613-951-0600; kowarus@statcan.ca), Manufacturing, Construction and Energy Division.

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Shipments, inventories and orders in all manufacturing industries

	Shipments		Inventories		Unfilled orders		New orders		Inventory-to-shipment ratio
	Seasonally adjusted								
	\$ millions	% change	\$ millions	% change	\$ millions	% change	\$ millions	% change	
March 2002	41,803	-0.9	61,724	-0.8	46,931	0.7	42,137	-1.1	1.48
April 2002	43,982	5.2	61,861	0.2	46,641	-0.6	43,693	3.7	1.41
May 2002	43,380	-1.4	61,657	-0.3	46,761	0.3	43,500	-0.4	1.42
June 2002	43,228	-0.3	61,612	-0.1	46,933	0.4	43,400	-0.2	1.43
July 2002	43,649	1.0	61,958	0.6	46,440	-1.1	43,156	-0.6	1.42
August 2002	43,851	0.5	62,407	0.7	47,556	2.4	44,968	4.2	1.42
September 2002	44,134	0.6	62,320	-0.1	46,963	-1.2	43,541	-3.2	1.41
October 2002	44,132	0.0	62,580	0.4	46,491	-1.0	43,660	0.3	1.42
November 2002	43,385	-1.7	62,989	0.7	46,127	-0.8	43,021	-1.5	1.45
December 2002	42,998	-0.9	63,161	0.3	44,820	-2.8	41,690	-3.1	1.47
January 2003	44,586	3.7	62,914	-0.4	43,266	-3.5	43,032	3.2	1.41
February 2003	44,088	-1.1	63,436	0.8	43,017	-0.6	43,839	1.9	1.44
March 2003	44,694	1.4	63,695	0.4	42,856	-0.4	44,533	1.6	1.43

Manufacturing industries except motor vehicle, parts and accessories

	Shipments		Inventories		Unfilled orders		New orders	
	Seasonally adjusted							
	\$ millions	% change	\$ millions	% change	\$ millions	% change	\$ millions	% change
March 2002	33,955	-0.0	58,362	-0.7	45,299	0.6	34,247	-0.4
April 2002	35,103	3.4	58,431	0.1	44,970	-0.7	34,774	1.5
May 2002	35,058	-0.1	58,179	-0.4	45,046	0.2	35,135	1.0
June 2002	34,865	-0.6	58,174	0.0	45,234	0.4	35,052	-0.2
July 2002	34,846	-0.1	58,383	0.4	44,707	-1.2	34,319	-2.1
August 2002	35,261	1.2	58,914	0.9	45,663	2.1	36,218	5.5
September 2002	35,787	1.5	58,808	-0.2	44,932	-1.6	35,056	-3.2
October 2002	35,834	0.1	59,130	0.5	44,532	-0.9	35,434	1.1
November 2002	35,260	-1.6	59,403	0.5	44,195	-0.8	34,923	-1.4
December 2002	35,740	1.4	59,410	0.0	42,967	-2.8	34,511	-1.2
January 2003	36,319	1.6	59,364	-0.1	41,448	-3.5	34,800	0.8
February 2003	35,971	-1.0	59,856	0.8	41,233	-0.5	35,756	2.7
March 2003	36,260	0.8	60,209	0.6	41,125	-0.3	36,153	1.1

Insights on the New Economy: Information and communications technology and science-based industries

1981 to 1997

Information and communications technology (ICT) industries have dynamic output, employment and productivity characteristics, but they are not the only source of growth in Canada's high-tech economy, according to a new study.

This study, the first in a new analytical series that examines industrial transitions in the Canadian economy, focusses on companies in ICT and science-based industries, innovative sectors associated with the growth of the New Economy.

Production and performance trends in ICT industries during the late 1980s and much of the 1990s surpassed most other business sector industries that fall outside the ICT and science groups, often by a considerable margin. Gross domestic product (GDP) growth, productivity growth, investments in technology, and research and development expenditures are all areas in which the ICT sector excels.

The rapid growth of the technology sector is a central characteristic of the New Economy. From 1987 to 1997, real GDP in the ICT sector almost doubled (+96%). This was more than three times the rate of growth of 28% for industries outside the ICT and science areas.

Companies in the ICT sector employed 44% more workers in 1997 than in 1981, while employment outside the ICT and science industries rose by only 24%. At the same time, long-run multifactor productivity gains in the ICT sector averaged 1.7% a year, about four times the rate of growth of 0.4% for industries outside the ICT and science areas.

Productivity gains in high-tech sector heavily concentrated in manufacturing

This study divided industries that comprise the ICT sector into three groups: ICT manufacturing; core ICT services, such as computer services and telecommunications services; and other ICT services.

The study found that from 1987 to 1997, productivity gains in high-tech companies were heavily concentrated in manufacturing firms, not those engaged in services. During this 10-year period, labour productivity in ICT manufacturing firms rose 90%, or 6.7% a year. This was well above gains of only 27%, or 2.4% a year, in core ICT services (computer and telecommunications services).

Labour productivity, a measure of the output for every hour worked, is an indicator of a nation's standard of living. Multifactor productivity, a broader indicator, accounts for changes in both capital and labour, thus

Note to readers

This release is based on the first major study in a new research paper series called The Canadian Economy in Transition that focusses on industrial transitions in Canadian industry.

This study examines different groups of industries that are associated with the growth of the New Economy. It compares the production and performance of information and communications technology (ICT) industries and science-based industries with more traditional elements of the business sector. The goal is to evaluate whether ICT and science-based industries exhibit different input structures and performance characteristics than more traditional goods and services industries.

Two groups of high-tech industries are examined. The first group is a collection of industries that the OECD refers to as the ICT sector. The study divides industries that make up the ICT sector into three subgroups: ICT manufacturing, core ICT services (computer services and telecommunications services) and other ICT services.

The second group is a collection of science-based industries that make relatively large investments in research and development and skilled workers, two important sources of industrial innovation. The science sector includes many industries that the OECD classifies as ICT-based. But the science sector also includes many other industries that are not part of the OECD's definition of the ICT sector. The report examines two non-ICT subgroups in the science sector: science-based goods industries and science-based service industries.

In 2001, firms operating in ICT industries accounted for 5.5% of business sector employment and 5.7% of business revenue. Science industries operating outside the ICT sector made up an additional 5.3% of employment and 6.9% of revenue.

Data for this study came from various surveys and administrative data sources used to support Statistics Canada's System of National Accounts.

For more information on Statistics Canada's research on the New Economy, see A Guide to research on the New Economy (11-622-MIE2003001, free) on Statistics Canada's website (www.statcan.ca).

providing a productivity measure that more closely approximates changes in efficiency.

Even after controlling for differences in the use of capital, ICT manufacturing still showed a large productivity advantage over ICT services. From 1981 to 1997, multifactor productivity more than doubled (+126%) in ICT manufacturing, increasing an average of 5.2% a year.

In contrast, multifactor productivity rose only 13% in computer and telecommunications services, an average of only 0.8% a year.

However, core ICT services incurred the fastest growth rates in terms of both economic output and employment.

From 1987 to 1997, real GDP in computer services and telecommunications increased 8.2% a year, compared with only 2.5% for industries that were not part of these ICT and science groups.

From 1981 to 1997, employment in core ICT services increased 85%, or 3.9% annually, while remaining stable in ICT manufacturing.

Science-based industries: Dynamic performance not unique to the ICT sector

The science sector includes many other industries that are not part of the OECD's definition of the ICT sector. By analysing these non-ICT science industries, this study offers a more diverse perspective on the economy's high-tech landscape. Many of these industries also contributed to the growth of the New Economy — via investments in research and development and skilled labour.

Long-run production and performance characteristics in many of these science-based industries rivaled, or surpassed, those for the ICT sector.

For example, strong productivity performance in the New Economy was not limited to manufacturers in the ICT sector. Science-based goods industries, which include many "heavy manufacturing" industries such as petroleum products, aircraft industries, industrial chemicals and pharmaceuticals, also registered sharp productivity gains during the 1980s and the 1990s.

Multifactor productivity in science-based goods industries increased 51% from 1981 to 1997, substantially stronger growth than for any of the high-tech service industries studied. Science-based goods industries also had high rates of investment and enjoyed high profit margins.

Even in services, the march towards a New Economy involved more than core ICT services. Science-based service industries, which include professional services such as engineering, architecture, and scientific and technical services, place a higher priority on knowledge workers. In 1996, 71% of workers in science-based service industries were classified as knowledge-based, compared with 53% of workers in core ICT service industries.

In addition, there are many examples of industries with dynamic production and performance characteristics outside of the ICT and science groups. About one third of industries that were not classified as ICT or science-based had long-run multifactor productivity growth rates that exceeded the growth average for the ICT sector. And certain industries, including a cluster of motor vehicle industries, stood up well against the ICT average across a range of statistical indicators.

Two research papers from The Canadian Economy in Transition Series, *A guide to research on the New Economy* (11-622-MIE2003001, free) and *The growth and development of New Economy industries* (11-622-MIE2003002, free), are now available on Statistics Canada's website (www.statcan.ca). From the *Our products and services* page, under *Browse our Internet publications*, choose *Free*, then *National accounts*.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Guy Gellatly (613-951-3758), or Desmond Beckstead (613-951-6199), Micro-Economic Analysis Division. ■

OTHER RELEASES

Canadian Vehicle Survey — erratum

Fourth quarter 2002

The data released in *The Daily* of May 14, 2003, were those of the third quarter 2002, not those of the fourth quarter as it was indicated. Below are the numbers for the fourth quarter of 2002.

Vehicles covered in the Canadian Vehicle Survey travelled an estimated 74.1 billion kilometres in the fourth quarter of 2002. Among them, vehicles weighing less than 4 500 kilograms (and not used as a bus) travelled 67.6 billion kilometres, or 91% of the total for the quarter.

The survey measures the activity of all on-road vehicles registered in Canada with the exception of some vehicles such as motorcycles, construction equipment and road maintenance equipment.

Estimates of total vehicle-kilometres are available by province and territory. Estimates of passenger-kilometres are available by province only.

Information on methods and data quality available in the Integrated Meta Data Base: survey number 2749.

The fourth quarter 2002 issue of *The Canadian Vehicle Survey* (53F0004XIE, free) is now available on Statistics Canada's website (www.statcan.ca). From the *Our products and services* page, under *Browse our Internet publications*, choose *Free*, then *Transport and warehousing*.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Client Services (1-866-500-8400; transportationstatistics@statcan.ca), Transportation Division. ■

Machinery and Equipment Price Index

First quarter 2003

The Machinery and Equipment Price Index (1986=100) was 138.6 in the first quarter, down 1.9% from the fourth quarter of 2002. The domestic and imported

components decreased 0.2% and 3.5%, respectively. Compared with the first quarter of 2002, the overall index fell 1.6%, led by the import component (-3.4%), while the domestic component rose 0.6%.

Compared with the fourth quarter of 2002, all industry groups decreased. Manufacturing (-2.1%), transport (-1.4%), agriculture (-2.5%) and community, business and personal services (-2.2%) contributed substantially. Manufacturing was led mainly by paper and allied products (-2.4%), chemicals (-2.1%) and by primary metals (-2.4%). In the transportation sector, the railway transport increase (+2.9%) partly offset declines in electricity (-1.2%), telephone (-2.6%) and air transport (-2.9%).

The year-over-year decrease was due to manufacturing (-2.0%), transportation (-1.3%), and community, business and personal services (-2.4%).

In the first quarter, most commodities decreased, in particular specialized industrial equipment (-2.4%), trucks (-2.6%), passenger automobiles (-2.6%), farm and garden tractors (-3.8%), other agricultural machinery (-1.8%) and aircraft (-3.7%). A notable exception was locomotives, which increased 4.5%.

The strength of the Canadian dollar had a major impact on the fall of the import component of the Machinery and Equipment Price Index. The Canadian dollar was worth an average of 66.15 US cents in the first quarter, up 4.2% from the fourth quarter and 5.1% from the first quarter of 2002.

Available on CANSIM: tables 327-0013, 327-0014 and 327-0016.

Information on methods and data quality available in the Integrated Meta Data Base: survey number 2312.

The first quarter 2003 issue of *Capital expenditure price statistics* (62-007-XPB, \$24 / \$79) will be available in July. See *How to order products*.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Rebecca McDougall (613-951-3357, fax 613-951-1539, infounit@statcan.ca), Prices Division. □

Machinery and Equipment Price Index (1986=100)

	Relative importance	First quarter 2003 ^P	Fourth quarter 2002 to First quarter 2003	First quarter 2002 to First quarter 2003
% change				
Machinery and Equipment Price Index	100.0	138.6	-1.9	-1.6
Agriculture	11.0	170.4	-2.5	-0.5
Forestry	1.5	148.0	-1.5	-0.6
Fishing	0.6	132.2	-1.5	-0.1
Mines, quarries and oil wells	6.0	142.0	-2.0	-1.3
Manufacturing	29.9	146.2	-2.1	-2.0
Construction	3.5	147.1	-2.6	-1.9
Transportation, communication, storage and utilities	25.9	130.5	-1.4	-1.3
Trade	4.0	122.7	-2.0	-1.7
Finance, insurance and real estate	1.8	111.3	-1.3	-1.2
Community, business and personal services	11.1	111.6	-2.2	-2.4
Public administration	4.7	134.1	-2.2	-2.3

^P Preliminary figures.

Steel primary forms — weekly data

Week ending May 10, 2003 (preliminary)

Steel primary forms production for the week ending May 10 totalled 314 937 metric tonnes, up 4.2% from 302 180 tonnes a week earlier and 2.2% from 308 085 tonnes in the same week of 2002.

The year-to-date total as of May 10 was 5 655 589 tonnes, down 3.2% from 5 840 099 tonnes in the same period of 2002.

Information on methods and data quality available in the Integrated Meta Data Base: survey number 2131.

For more information, or to enquire about the concepts, methods or data quality of this release, contact the dissemination officer (1-866-873-8789; 613-951-9497; manufact@statcan.ca), Manufacturing, Construction and Energy Division. ■

Coal and coke statistics

February 2003

Data on coal and coke are now available for February.

Available on CANSIM: tables 303-0016 and 303-0017.

Information on methods and data quality available in the Integrated Meta Data Base: survey numbers, including related surveys, 2003 and 2147.

For more information, or to enquire about the concepts, methods or data quality of this release, contact the dissemination officer (1-866-873-8789; 613-951-9497; manufact@statcan.ca), Manufacturing, Construction and Energy Division. ■

Annual Survey of Service Industries: Specialized design services 2001

The specialized design industry group, which includes landscape architecture, interior design, industrial design and graphic design industries, generated \$2.1 billion in operating revenues in 2001, an increase of \$66 million or 3.3% from 2000. This growth in revenue slowed considerably from the 14% growth rate in 2000 as a result of weaker economic conditions and reduced business spending in 2001. Operating profit margin was 9.4% in 2001, down from 13.5% in 2000.

Graphic design services continued to represent more than one-half of operating revenues in 2001 at 55.6%. Operating revenues increased by 3.6% to \$1.15 billion. Of the top 20 firms in the specialized design industry group, 11 specialized in graphic design services in 2001.

Interior design services firms generated \$532 million in 2001, an increase of 6.4%. Conversely, revenues for industrial design services fell 4.9%, reflecting reduced spending on industrial design services by the business sector in 2001.

The top 20 firms represented only 11% of operating revenue in 2001, illustrating the importance of medium and small firms in this industry.

Businesses are the primary customers for most design services; governments and households are secondary clients. However, for industrial design services, clients outside of Canada are the second-highest ranking purchasers of industrial design products, signifying the importance of Canadian-based industrial design quality to the rest of the world.

Establishments providing design services numbered 8,475 in 2001, up 9.8% from 7,716 in 2000.

Available on CANSIM: table 360-0002.

Information on methods and data quality available in the Integrated Meta Data Base: survey number 4719.

For more information about the survey, or to enquire about the concepts, methods or data quality of this release, contact Marg Côté (613-951-0406; fax: 613-951-6696; marg.cote@statcan.ca), Service Industries Division. ■

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