



The Daily

Statistics Canada

Monday, November 15, 2004

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Weak demand for North American-built passenger cars was largely responsible for the 3.2% decline in new motor vehicle sales in September — the second consecutive monthly decrease.

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MAJOR RELEASES

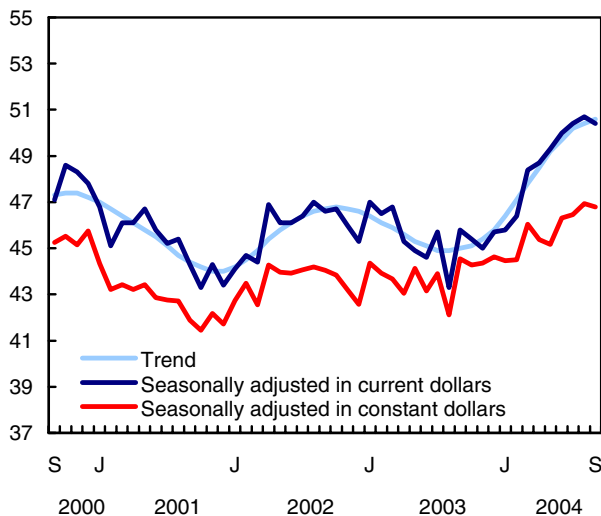
Monthly Survey of Manufacturing

September 2004

Following a nine-month climb, shipments retreated 0.6% to \$50.4 billion in September, as a marked decline in the aerospace industry weakened production. Excluding the aerospace industry, shipments remained comparable with August's level.

Manufacturing activity weakens slightly after a long run

\$ billions



The manufacturing sector has done well in 2004 as September's decrease in shipments was only the first since November 2003. Healthy demand from abroad has driven durable goods manufacturing through much of the year and coupled with soaring industrial prices for many of Canada's rich, resource-based industries, shipments have been at record levels in recent months.

Manufacturers continue to face challenges

Natural disasters and political upheaval in various parts of the world caused quite a stir in the marketplace in September. Hurricanes battered the Caribbean and southeastern United States, hampering oil production in the Gulf of Mexico. In addition, ongoing political strife in the oil-rich Middle East and Nigeria added to the mix of uncertainty in the global state of oil production. As a result, the price of crude oil began to surge again in

Note to readers

To reduce respondent burden, data previously collected via questionnaire for approximately 50% of the simple establishments in the Monthly Survey of Manufacturing (MSM) sample are now replaced with modeled estimates based on the Goods and Services Tax (GST) returns (effective the August 2004 reference month). Revenue data based on the GST are received from the Canada Revenue Agency on a monthly basis. Data for shipments are derived through the use of statistical modeling. The model takes into account the shipments to revenue relationship, as well as the time lag between the reference month for the MSM and the reference period of the GST estimates.

For additional information, refer to the online article Monthly Survey of Manufacturing: Use of administrative data (31-533-XIE, free).

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

Durable goods industries include wood products, non-metallic mineral products, primary metals, fabricated metal products, machinery, computer and electronic products, electrical equipment, appliances 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 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.

September, and by late October it would hit a record US \$55 per barrel, which may further affect future manufacturing output.

In addition, the Canadian dollar began to strengthen again in September, at the expense of the US greenback. By mid-October, the dollar would attain its highest value in over a decade. The soaring dollar, coupled with high input prices, continued to chip away at manufacturers' profit margins which may inhibit their ability to expand production and compete internationally.

Although only 11 of the 21 manufacturing industries reported decreases in September, these

industries accounted for 70% of total shipments. On a provincial basis, Ontario (-0.3%), Quebec (-1.7%) and Saskatchewan (-4.8%) led the six provinces reporting declines for the month.

Shipments measured in constant dollars slipped 0.3% in September, the first decline since May.

Factories producing few new jobs in 2004

Despite September's decline in shipments, 2004 has been a busy year for manufacturers. From January to September, shipments were up a brisk 8.2% compared with the same period in 2003, with more than half of the increase concentrated in the durable goods sector (up 9.3% for the year). However, the buzz of activity on the factory floor has not translated into large job gains. According to the most recent Labour Force Survey, employment in manufacturing was little changed in October and has remained lacklustre since the fall of 2003.

According to the Business Conditions Survey for October, manufacturers remained confident regarding their prospects for the final quarter of 2004. Manufacturers anticipated further improvements for production and employment, while they were also satisfied with the level of orders received.

Aerospace manufacturing tumbles

The brunt of September's decline in manufacturing activity was concentrated in the aerospace products and parts industry. Seasonal factors, coupled with the completion of some contracts in prior months, contributed to a 22.9% drop in production to \$880 million in September. In spite of the big decrease, year-to-date production remained 10.7% above levels of the same period in 2003.

Shipments of primary metals fell 1.7% from August's record high of \$3.9 billion. Although steel product prices remained strong, industrial prices for primary metals have eased in recent months (-1.1% in September), contributing to the lower shipments.

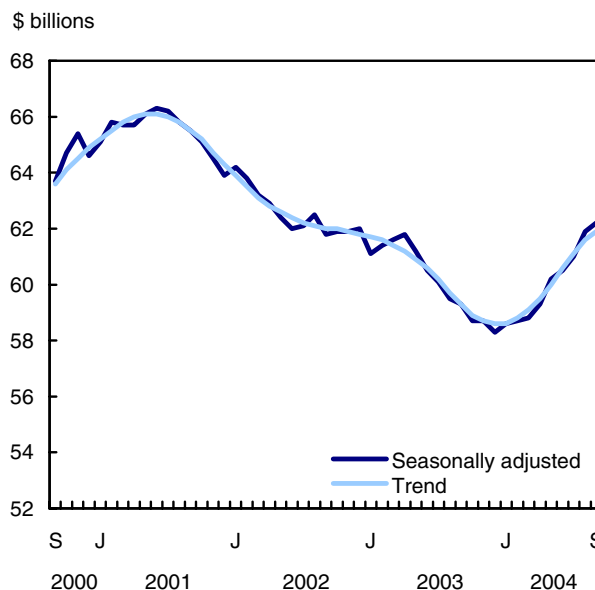
Other industries reporting decreases included wood products (-1.6%) and paper (-1.5%) manufacturing.

Several industries continued to report strong manufacturing activity in September, partly offsetting the overall decline in manufacturing for the month. Shipments of petroleum and coal products topped the \$4 billion mark (+2.5%) for the first time ever — entirely due to a 2.5% boost in petroleum prices for the month. Wide-ranging increases were reported by the booming fabricated metals products industry (+2.9%). January-to-September shipments for this industry are up 10.5% versus 2003.

Inventories on an upward trend

Notwithstanding the first decline of shipments in several months, there were mixed signals on the inventory front. Raw material inventories, which are generally built-up in anticipation of future production, rose 0.4% to \$27.1 billion — the seventh successive increase.

Manufacturers stock up on finished products



Meanwhile, inventories of finished products increased 1.1% to \$21 billion in September, the highest level since October 2001. Some manufacturers noted concerns about the higher levels of finished-product inventories, as reported in the Business Conditions Survey for October.

The increases in raw materials and finished-product inventories contributed to the 0.5% boost in total inventories in September. Inventories now stand at \$62.2 billion, up almost 7.0% since the close of 2003, and extending the upward trend in inventories to nine months.

Primary metals (+2.3%), fabricated metal products (+2.1%) and machinery (+1.7%) manufacturing contributed to the higher level of inventories in September.

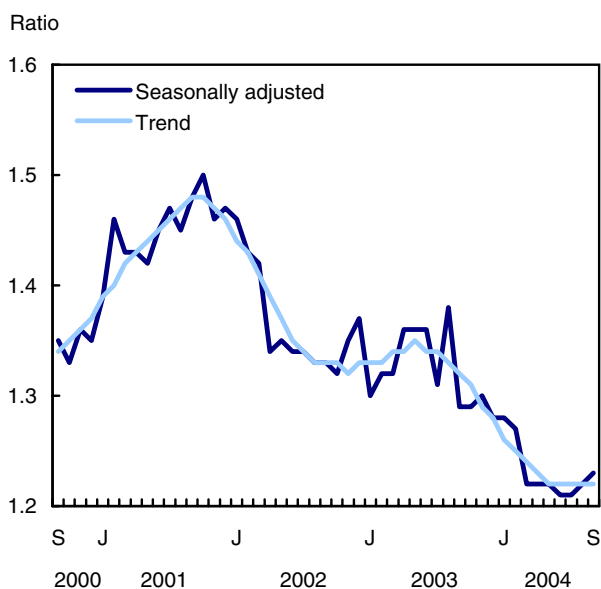
Inventory-to-shipment ratio edges upwards again

Lower shipments, coupled with a 0.5% rise in inventory levels, contributed to the second consecutive increase in the inventory-to-shipment ratio. The ratio edged up to 1.23 in September, just shy of ratio

of 1.21 posted in June and July — the lowest level since the start of the current series in 1992.

The inventory-to-shipment ratio is a key measure of the time, in months, that would be required in order to exhaust inventories if shipments were to remain at their current level.

Lower shipments, higher inventory-to-shipment ratio



Manufacturers faced with fewer unfilled orders

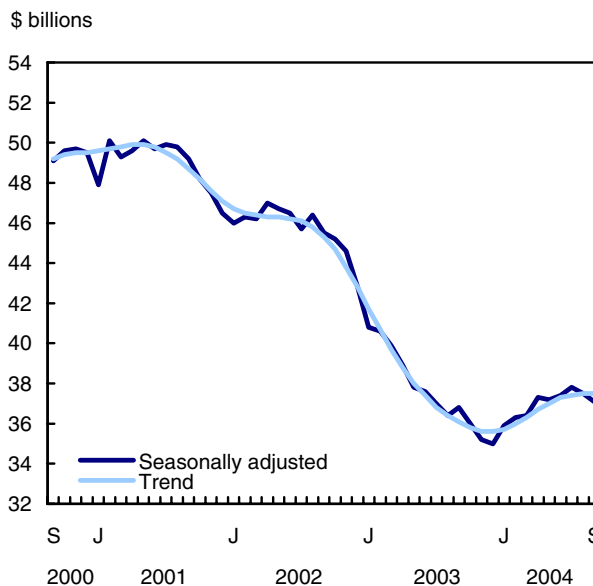
Manufacturers' unfilled orders weakened further in September. Orders retracted by 1.0% to \$37.1 billion, following a 0.9% drop in August. Despite the recent declines, manufacturers still have a cushion that was built-up earlier in the year as the backlog of unfilled orders remains 6.0% above levels at the close of 2003.

Among the industries reporting decreases were motor vehicle parts (-6.9%) and computer and electronic products (-2.3%) manufacturing. Partly offsetting the decline were manufacturers of fabricated metal products (+2.5%) and primary metals (+4.1%), as they continued to log additional orders in their books.

The beleaguered computer industry pulls down new orders

New orders fell 0.6% to \$50.0 billion in September. A sizable decline in the number of new contracts received by the long-suffering computer industry contributed to the decline. New orders of computer and electronic products slumped 8.9% to \$1.6 billion.

Backlog of unfilled orders continues to weaken



Other industries reporting fewer orders received included machinery (-2.6%) and motor vehicle parts (-2.2%) manufacturing.

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

Definitions, data sources and methods: survey number 2101.

The September issue of the *Monthly Survey of Manufacturing* (31-001-XIE, \$17/\$158) will soon be available.

Data for shipments by province in greater detail than normally published may be available on request.

The Annual Survey of Manufactures released estimates for reference year 2002 and revisions for 2000 and 2001 on June 16, 2004. In the future, the Monthly Survey of Manufacturing will re-benchmark to the Annual Survey of Manufacturers data for reference years 2000 and 2001 and benchmark to 2002.

Data from the October 2004 Monthly Survey of Manufacturing will be released on December 14.

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.

Manufacturing shipments, provinces and territories

	August 2004 ^r	September 2004 ^p	August 2004 to September 2004
Seasonally adjusted			
	\$ millions		% change
Canada	50,695	50,404	-0.6
Newfoundland and Labrador	268	249	-7.2
Prince Edward Island	115	116	0.4
Nova Scotia	739	784	6.1
New Brunswick	1,231	1,191	-3.2
Quebec	11,467	11,269	-1.7
Ontario	26,760	26,692	-0.3
Manitoba	1,093	1,054	-3.5
Saskatchewan	913	869	-4.8
Alberta	4,467	4,503	0.8
British Columbia	3,635	3,669	0.9
Yukon	1	2	29.5
Northwest Territories including Nunavut	5	5	4.5

^r Revised data.

^p Preliminary data.

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	
September 2003	45,818	5.8	59,307	-0.4	36,838	1.1	46,223	8.2	1.29
October 2003	45,373	-1.0	58,748	-0.9	35,984	-2.3	44,519	-3.7	1.29
November 2003	44,993	-0.8	58,708	-0.1	35,204	-2.2	44,213	-0.7	1.30
December 2003	45,678	1.5	58,301	-0.7	35,020	-0.5	45,493	2.9	1.28
January 2004	45,801	0.3	58,572	0.5	35,931	2.6	46,712	2.7	1.28
February 2004	46,355	1.2	58,671	0.2	36,346	1.2	46,770	0.1	1.27
March 2004	48,366	4.3	58,838	0.3	36,362	0.0	48,381	3.4	1.22
April 2004	48,749	0.8	59,304	0.8	37,279	2.5	49,667	2.7	1.22
May 2004	49,296	1.1	60,154	1.4	37,226	-0.1	49,243	-0.9	1.22
June 2004	49,988	1.4	60,492	0.6	37,375	0.4	50,136	1.8	1.21
July 2004	50,371	0.8	60,985	0.8	37,800	1.1	50,796	1.3	1.21
August 2004	50,695	0.6	61,911	1.5	37,452	-0.9	50,347	-0.9	1.22
September 2004	50,404	-0.6	62,206	0.5	37,090	-1.0	50,042	-0.6	1.23

Manufacturing industries except motor vehicle, parts and accessories

	Shipments		Inventories		Unfilled orders		New orders	
	Seasonally adjusted							
	\$ millions	% change	\$millions	% change	\$ millions	% change	\$ millions	% change
September 2003	37,482	4.2	56,143	-0.6	35,213	1.1	37,876	7.1
October 2003	37,087	-1.1	55,638	-0.9	34,303	-2.6	36,177	-4.5
November 2003	37,013	-0.2	55,615	-0.0	33,474	-2.4	36,183	0.0
December 2003	37,445	1.2	55,234	-0.7	33,255	-0.7	37,226	2.9
January 2004	37,579	0.4	55,507	0.5	34,130	2.6	38,454	3.3
February 2004	38,228	1.7	55,457	-0.1	34,487	1.0	38,585	0.3
March 2004	39,665	3.8	55,473	0.0	34,387	-0.3	39,564	2.5
April 2004	39,922	0.6	55,799	0.6	35,196	2.4	40,731	2.9
May 2004	40,374	1.1	56,713	1.6	35,133	-0.2	40,311	-1.0
June 2004	41,007	1.6	57,086	0.7	35,321	0.5	41,195	2.2
July 2004	41,383	0.9	57,536	0.8	35,722	1.1	41,784	1.4
August 2004	41,542	0.4	58,363	1.4	35,493	-0.6	41,313	-1.1
September 2004	41,272	-0.7	58,691	0.6	35,260	-0.7	41,039	-0.7



New motor vehicle sales

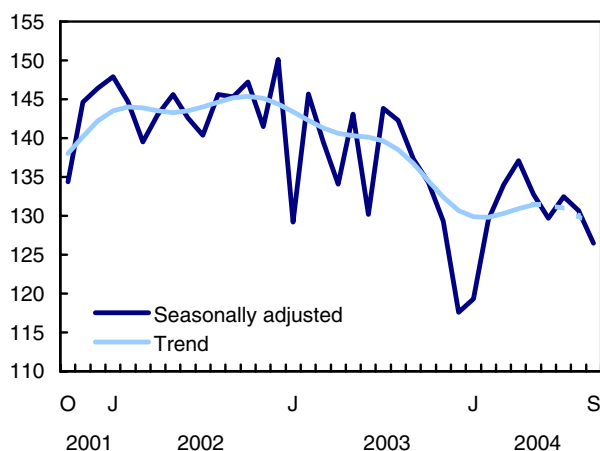
September 2004

Weak demand for North American-built passenger cars in September was largely responsible for the 3.2% decline in new motor vehicle sales — the second monthly consecutive decrease. In all, 126,482 new motor vehicles were sold, the second lowest level of sales in 2004 since January.

According to preliminary auto industry figures, the number of new motor vehicles sold in October is estimated to have surged by approximately 7%, mainly owing to an upswing in demand for new passenger cars.

New motor vehicle sales down for a second consecutive month

'000 units



The last few trend points could be subject to revisions when more data are added. This is indicated by the dashed line.

September's decline occurred despite favourable macro-economic indicators, including an easing in the unemployment rate, an increase in employment and a rising consumer confidence index. The same month saw, on average, a decrease (-0.7%) in the new vehicle consumer price index, partly as a result of incentives offered by manufacturers seeking to sell off inventories of 2004 models.

Cumulative sales for the first nine months of 2004 were 5.9% lower compared with the same period in 2003. New motor vehicle sales have been relatively weak in recent months, following a string of increases that began at the start of the year and peaked in April. Previously, sales had gone through a period of major declines throughout the second half of 2003. In

Note to readers

All data in this release are seasonally adjusted unless otherwise indicated. Seasonally adjusted provincial data back to January 1991 are available on CANSIM.

Passenger cars include those used for personal and commercial purposes, such as taxis or rental cars. **Trucks** include minivans, sport-utility vehicles, light and heavy trucks, vans and buses.

North American-built new motor vehicles include vehicles manufactured or assembled in Canada, the United States or Mexico. All other new motor vehicles are considered to have been manufactured overseas.

For reasons of confidentiality, data for Yukon, the Northwest Territories and Nunavut are included with those for British Columbia.

The New Motor Vehicle Sales Survey is compiled on the basis of figures obtained from motor vehicle manufacturers and importers. These results may vary from those obtained directly from auto dealers, due to possible differences in record keeping.

the first half of 2003, sales showed major fluctuations while at the same time trending downward.

Market share erodes for passenger cars

The decrease in new passenger car sales was much larger than for truck sales, which were down only slightly (-0.6%). Compared with August, passenger car sales fell 5.6% to 64,616 units. September's results caused the market share for passenger cars to slip to 51.1%, one of the two lowest levels in the past five years.

The decline in sales of new passenger cars was entirely attributable to North American-built cars, which dropped 9.4% compared with August. For the same period, overseas-built cars rebounded 5.4%, ending a string of four consecutive declines.

A total of 61,866 new trucks were sold in September, down 0.6% from August. Trucks include minivans, sport-utility vehicles, light and heavy trucks, vans and buses.

Both passenger car sales and truck sales have registered four declines in five months. They grew in the first four months of 2004, following a period of steep declines that were accentuated in the second half of 2003. This downward movement first appeared in sales of passenger cars, which began to decline in the fall of 2002. For truck sales, the weakness began to appear in mid-2003.

Foreign cars made in North America continue to gain market share

North American-built cars include those of the big three North American auto makers as well as foreign

makes produced in North America. In 2004, the latter continued to garner market share.

For the first nine months of 2004, sales of foreign cars made in North America captured 30.9% of the passenger car market, compared with 29.3% in 2003. In 2000, their share was 24.2% while in 1995 it was only 18.8%.

As for the market share for new trucks, the big North American auto makers still largely dominate the market, but here again foreign manufacturers are making gains. They accounted for 9.2% of sales for the first nine months of 2004, more than four times as much as in 1995.

Market share for foreign vehicles made in North America (units sold)

	Passenger cars %	Trucks
1995	18.8	2.1
2000	24.2	6.4
2003	29.3	8.7
First nine months of 2004	30.9	9.2

Sales down in nearly all provinces

In September, new motor vehicle sales declined in every province compared with August, except in Prince Edward Island (+6.0%) and Newfoundland and Labrador (+0.3%). The largest declines were reported in Saskatchewan (-10.8%) and Ontario (-5.8%). In the

other provinces, the declines were below the national average (-3.2%).

Cumulative motor vehicle sales for the first nine months of 2004 declined in all provinces. The biggest decreases were registered in the Atlantic provinces, led by New Brunswick (-10.4%) and Newfoundland and Labrador (-9.9%). In the West, Saskatchewan (-8.2%) reported the largest decline. Ontario (-7.5%) also posted a steep drop, while the decline for Quebec (-5.9%) was the same as the national average. Among the provinces posting below-average decreases, Western provinces predominated, including the region formed by British Columbia and the three territories (-2.4%), Manitoba (-2.9%) and Alberta (-3.4%), along with Prince Edward Island (-2.3%) and Nova Scotia (-3.2%).

Available on CANSIM: tables 079-0001 and 079-0002.

Definitions, data sources and methods: survey number 2402.

The September issue of *New Motor Vehicle Sales* (63-007-XIE, \$14/\$133) will soon be available.

Data on new motor vehicle sales for October 2004 will be released on December 13.

For general information or to order data, contact Client Services (1-877-421-3067; 613-951-3549; retailinfo@statcan.ca). To enquire about the concepts, methods or data quality of this release, contact Cl rance Kimanyi (613-951-6363), Distributive Trades Division

□

New motor vehicle sales

	September 2003	August 2004 ^f	September 2004 ^P	September 2003 to September 2004	August to September 2004
seasonally adjusted					
	number of vehicles			% change	
New motor vehicles	137,324	130,674	126,482	-7.9	-3.2
Passenger cars	70,382	68,433	64,616	-8.2	-5.6
North American ¹	49,574	50,662	45,891	-7.4	-9.4
Overseas	20,809	17,771	18,725	-10.0	5.4
Trucks, vans and buses	66,942	62,241	61,866	-7.6	-0.6
New motor vehicles					
Newfoundland and Labrador	2,106	2,002	2,008	-4.7	0.3
Prince Edward Island	397	386	409	3.0	6.0
Nova Scotia	3,630	3,763	3,719	2.5	-1.2
New Brunswick	3,110	2,998	2,973	-4.4	-0.8
Quebec	35,793	32,710	32,258	-9.9	-1.4
Ontario	53,292	50,148	47,259	-11.3	-5.8
Manitoba	3,857	3,805	3,758	-2.6	-1.2
Saskatchewan	3,507	3,440	3,074	-12.3	-10.6
Alberta	15,994	16,273	16,040	0.3	-1.4
British Columbia ²	15,638	15,149	14,984	-4.2	-1.1
	September 2003	August 2004 ^f	September 2004 ^P	September 2003 to September 2004	
unadjusted					
	number of vehicles			% change	
New motor vehicles	141,988	136,187	130,699	-8.0	
Passenger cars	73,286	73,943	66,729	-8.9	
North American ¹	50,433	53,721	46,308	-8.2	
Overseas	22,853	20,222	20,421	-10.6	
Trucks, vans and buses	68,702	62,244	63,970	-6.9	
New motor vehicles					
Newfoundland and Labrador	2,101	2,282	2,118	0.8	
Prince Edward Island	421	430	425	1.0	
Nova Scotia	3,273	3,848	3,392	3.6	
New Brunswick	2,996	3,123	2,884	-3.7	
Quebec	37,287	35,857	33,223	-10.9	
Ontario	56,827	51,777	50,266	-11.5	
Manitoba	4,359	4,146	4,145	-4.9	
Saskatchewan	3,859	3,729	3,252	-15.7	
Alberta	16,555	15,922	16,606	0.3	
British Columbia ²	14,310	15,073	14,388	0.5	

^r Revised.

^p Preliminary.

1. Manufactured or assembled in Canada, the United States or Mexico.

2. Includes Yukon, the Northwest Territories and Nunavut.

■

OTHER RELEASES

Dairy statistics

September 2004 (preliminary)

Dairy farmers sold 614 000 kilolitres of milk and cream to dairies in September, up 0.3% from September 2003. Fluid milk sales stood at 236 000 kilolitres, and industrial milk sales at 378 000 kilolitres. Industrial milk is used to manufacture butter, cheese, yogurt, ice cream, milk powders and concentrates.

Available on CANSIM: tables 003-0007 to 003-0012, 003-0029, 003-0033 and 003-0034.

Definitions, data sources and methods: survey numbers, including related surveys, 3430, 3431 and 3432.

The third quarter 2004 issue of *The Dairy Review* (23-001-XIB, \$29/\$96) will soon be available.

For more information, contact Anna Michalowska (613-951-2442; 1-800-465-1991; fax: 613-951-3868), Agriculture Division. ■

Steel primary forms, weekly data

Week ending November 6, 2004 (preliminary)

Steel primary forms production for the week ending November 6 totalled 278 055 metric tonnes, down 8.2% from 303 037 tonnes a week earlier and down 14.3% from 324 398 tonnes in the same week of 2003.

The year-to-date total as of November 6 was 13 722 315 tonnes, up 2.5% from the same period of 2003.

Definitions, data sources and methods: 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. ■

Cement

September 2004

Data for September on cement are now available.

Available on CANSIM: table 303-0001.

Definitions, data sources and methods: survey number 2140.

The September issue of *Cement*, Vol. 56, no. 9 (44-001-XIB, \$6/\$51) is now available. See *How to order products*.

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. ■

NEW PRODUCTS

Cement, September 2004, Vol. 56, no. 9
Catalogue number 44-001-XIB (\$6/\$51).

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

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

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Catalogue 11-001-XIE (11-001-XIE) 11-001-XIE



Statistics Canada

Thursday, June 5, 1997
For release at 9:30 a.m.



MAJOR RELEASES

- **Urban transit, 1995** 2
Despite the problems in taking urban transit, Canadians are using it less and less. In 1996, about 10 million Canadians took an average of about 10 trips on some form of urban transit, the lowest level in the past 25 years.
- **Productivity, hourly compensation and unit labour cost, 1995** 4
Growth in productivity among Canadian businesses was noticeably weak again in 1996, accompanied by sluggish gains in employment and slow economic growth during the year.

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- **Egg production, April 1997** 12

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Statistics Canada's official release bulletin

Catalogue 11-001-XIE.

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