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MAJOR RELEASES

OTHER RELEASES

MAJOR RELEASES

Labour productivity performance by industry
2003

Labour productivity in the manufacturing sector slowed markedly in 2003. Productivity growth in manufacturing advanced at 1.2% in 2003, compared with 2.8% in 2002. Ten of the 20 industries forming the manufacturing sector recorded a decline in productivity, while another quarter recorded a slowdown in productivity growth.

The stronger Canadian dollar in 2003 had a negative impact on the output of manufacturing industries, which decreased by 0.5% in 2003. At the same time, hours worked in this sector declined at a more pronounced pace (-1.7%). During this period, the rapid appreciation of the Canadian dollar pressured Canadian exporters of manufacturing goods to adjust their operating costs.

Much like the manufacturing sector, the majority of other industries (11 of 15) in the business sector recorded a decline or a slower productivity growth. In contrast, sectors such as agriculture, forestry, fishing and hunting; professional services; as well as arts, entertainment and recreation; and other commercial services, experienced an acceleration of productivity growth in 2003.

The year 2003 was marked by several negative shocks that affected economic activity and contributed to a lacklustre 0.1% growth in the business sector's productivity growth. This is the smallest gain of the last six years, during which productivity grew at 1.9% on average.

Productivity growth is an essential contributor to the prosperity of Canadians over the long run. It measures the efficiency with which labour is employed in the production process.

Nearly all industries experienced a slowdown in productivity

In 2003, labour productivity growth varied significantly across industry groups, ranging from a 6.3% decline in the mining and oil and gas extraction sector to an 8.8% increase in the agriculture, forestry, fishing and hunting sector.

Following the 2.2% drop in 2002, labour productivity rebounded in 2003 in agriculture, forestry, fishing and hunting, where it grew at 8.8%. This is the largest increase of any sector and is attributable to better harvests in Western Canada.

With a 3.9% productivity growth in 2003, wholesale trade ranked second, down from the 6.6% recorded in 2002. They were followed by other industry groups, including other services (+3.6%), professional services (+2.9%), arts, entertainment and recreation (+2.2%), and retail trade (+1.6%).

With the exception of the agriculture, forestry, fishing and trapping industry, manufacturing was the only other industry group in the goods-producing sector that recorded a productivity increase in 2003. Over the last three years, the average annual growth of labour productivity in manufacturing advanced at 2.0%, about half of the 4.4% experienced between 1997 and 2000.

The increase in manufacturing productivity in 2003 was mainly driven by the productivity recovery in the computer and electronic products (+8.4%) and the electrical equipment, appliance and component manufacturing industries (+1.3%). These two industries had reported a productivity decline during the two previous years.

In the manufacturing sector as a whole, output per hour worked increased in 7 of the 20 three-digit industry groups; the annual gains ranging from 0.8% to 5.7%. Within this group, non-metallic mineral products, printing and related support activities and primary metal manufacturing all experienced productivity gains of at least 3.5%.

Despite the housing market bubble, finance, insurance, real estate, rental and leasing experienced no productivity gain in 2003. The seven remaining two-digit industries registered a productivity decline in 2003.

Unit labour cost increases in most of the industries

Unit labour cost, an indicator that measures how hourly compensation changed relative to labour productivity, deteriorated in most industries in 2003. As a result of the lacklustre labour productivity, 11 of the 15 major industrial groups recorded increases in unit labour costs in 2003.

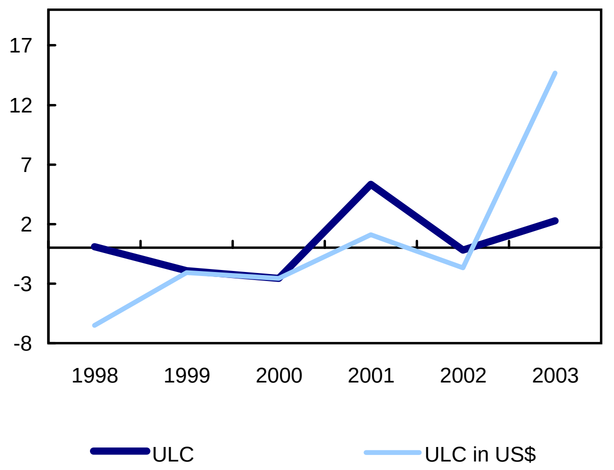
Industries that posted the best performance in terms of unit labour cost—agriculture, forestry, fishing and hunting—were generally the ones with the highest productivity gains.

Following the 9.7% increase in their unit labour cost in 2002, the agriculture, forestry, fishing and hunting experienced a significant 16.5% drop in its unit labour cost in 2003. Crop and animal production, and forestry and logging were the sectoral sources of this reduction.

Other declines were observed in arts, entertainment and recreation (-3.6%), followed by accommodation and food services (-2.8%) and wholesale trade (-0.7%).

Canadian dollar appreciation significantly increased the unit labour costs (ULC) in the manufacturing sector

% change from the previous year



In contrast, unit labour cost growth accelerated in most of the other two-digit industries of the business sector. In manufacturing, unit labour cost increased by 2.3% in 2003, following a slight 0.2% decline in 2002.

When the exchange rate is taken into account, the appreciation of the Canadian dollar led to a strong increase in the unit labour cost in manufacturing. Manufacturing unit labour costs increased by 14.7% in 2003 for US dollars. This strong appreciation in such a short period has contributed to the deterioration in the competitiveness of manufacturing exports to the United States.

A series of tables on productivity growth and related variables for the business sector and its 15 main industries will be available in a new dynamic publication *Canadian Productivity Accounts* (15-003-XIE, free), which will be available on May 26.

Available on CANSIM: tables 383-0013 and 383-0015.

Definitions, data sources and methods: survey number 1402.

For more information about productivity, see the *Overview and description of publications* page online or contact Jean-Pierre Maynard (613-951-3654; fax: 613-951-3292; *maynard@statcan.ca*), Micro-economic Analysis Division.

Annual growth of labour productivity for three-digit manufacturing industries
1998 to 2003

	1998	1999	2000	2001	2002	2003
Total, manufacturing	**1.7**	**5.7**	**6.0**	**-1.8**	**2.8**	**1.2**
Food	3.7	-4.4	7.7	5.1	0.6	0.8
Beverage and tobacco products	8.4	-3.5	5.8	-2.2	0.4	-4.4
Clothing	-2.9	-2.1	6.1	-5.6	4.6	-0.9
Leather and allied products	-4.0	-3.2	30.4	-8.0	-37.8	-8.3
Textile and textile product mills	8.7	0.4	8.8	-8.6	-6.4	-5.8
Wood products	5.6	0.6	9.8	9.3	10.3	3.4
Paper	-1.3	7.4	7.3	-8.5	10.9	0.9
Printing and related support activities	-4.9	0.1	13.5	3.5	-1.4	3.7
Petroleum and coal products	4.3	-2.7	-10.4	3.6	16.8	-2.3
Chemical	1.6	2.6	15.3	7.1	7.0	-1.2
Plastics and rubber products	-0.4	3.6	3.0	5.2	8.8	2.6
Non-metallic mineral products	2.1	4.0	5.6	2.7	3.4	5.7
Primary metals	4.5	2.5	6.9	5.8	6.3	3.5
Fabricated metal products	-1.0	6.7	4.4	-3.6	1.1	-1.1
Machinery	-2.5	4.8	6.2	-3.6	-2.8	-2.7
Computer and electronic products	8.7	43.0	10.3	-20.1	-4.4	8.4
Electrical equipment, appliance and components	10.8	-6.9	26.7	-10.1	-1.1	1.3
Transportation equipment	2.2	14.8	4.1	-3.4	2.5	1.2
Furniture and related products	3.5	3.0	9.0	-6.6	-0.2	-1.0
Miscellaneous	4.7	-4.5	3.2	-5.1	4.3	-2.4

■

Annual retail trade

2002

Fierce competition and declining prices for some retail goods did not prevent store retailers from achieving a robust year in 2002. Store retailers enjoyed a stellar performance in 2002, with total operating revenues reaching $344 billion in 2002, a gain of 6.6% over 2001.

Gains in operating revenues widespread

Gains in operating revenues were widespread among major retail categories. Home centres and hardware stores registered the strongest gain (20.9%) in 2002 as growth in spending on housing renovations remained solid. This was followed by home electronics and appliance stores, which grew 13.5% in 2002, partly as a result of to low financing costs and higher demand for housing.

Independent retailers continued to account for the largest share of the retail industry in 2002 with about 59% of total operating revenues. For this retail format, new car dealers contributed over one-third (37.5%) of total operating revenues.

Chain store operators accounted for the remaining 41% of total retail operating revenues in 2002. Supermarkets had the largest share (22.3%) of that format's total operating revenues.

Retail gross margins increased marginally

The gross margin percentage of operating revenue of all retailers edged up slightly from 26.2% in the previous year to 26.6% in 2002. Beer, wine and liquor stores had the largest gain in their margin rate, from 40.0% in 2001 to 47.7% in 2002. The sharp increase was because of the proportionally higher sale volumes of spirits, which have a greater margin than beer or wine. Other gains were recorded in computer and software stores, furniture stores, new car dealers, and used and recreational motor vehicle and parts dealers.

Overall, gross margins for retail chain stores were much higher (+32.9%) than that of independent retailers (+22.2%). For chain stores, the highest gross margin rate was recorded in beer, wine and liquor stores (+50.8%). The shoe, clothing accessories and jewellery stores group had the highest gross margin for independent retailers (+44.3%). On the other hand, at 13.6%, new car dealers realized the lowest gross margins for both retail formats.

Note to readers

This release combines data from two surveys: the annual Retail Store Survey, covering independent retail outlets, and the annual Retail Chain Survey, covering chain retailers.

*Retail stores can be categorized into two broad groups: chains (including department stores) and independents. A **retail chain** is an organization operating four or more retail outlets in the same industry class under the same legal ownership, at any time during the survey year. An independent retailer operates fewer than four locations. This categorization is different from the concept of a franchised or branded operation, where the business (occasionally a chain, but more often an independent retailer) is licensed to sell a particular product or service under an advertised trade name.*

The information in this report is based on the North American Industry Classification System (NAICS). The results may differ from those published elsewhere under the 1980 Standard Industrial Classification (SIC). NAICS includes building material dealers computer software stores, and office supplies and stationary stores in the retail sector establishments that were classified to wholesale trade in the 1980 SIC. Under NAICS, establishments primarily engaged in automobile repair have been moved to services.

***Gross margin** is obtained by subtracting the cost of goods sold from the total operating revenues. The ratio is expressed as a percentage of the total operating revenues. This measure is also known as the return on sales.*

***Operating profit** is obtained by subtracting the total operating expenses plus the cost of goods sold (opening inventory plus purchases and direct costs minus closing inventory) from the total operating revenues. The ratio is expressed as a percentage of the total operating revenues.*

***Operating expenses-to-operating revenue ratio** is obtained by dividing the total operating expenses by the total operating revenues. The ratio is expressed as a percentage of the total operating revenues.*

Operating expenses-to-operating revenues ratio remained stable

As operating revenues surged, retailers kept expenses under control in 2002. Overall, the operating expenses-to-operating revenue ratio remained virtually unchanged at 20.1%, compared with 20.0% in 2001. Of the 19 major retail industry groups, 12 recorded values above the national average, ranging from a high of 39.3% in the clothing stores sector to a low of 21.7% in the convenience and specialty food stores industry. Of all the major retail groups, new car dealers recorded the lowest operating expense-to-operating revenue ratio in 2002, at 9.9%.

Operating profits of retailers improved

Stronger operating revenues of retailers translated into increased profits in 2002. Retailers' operating profit reached more than $22 billion, up from about $20 billion in 2001. Overall, the operating profit margin of retailers increased from 6.2% of operating revenues in 2001 to 6.6% in 2002. Leading the pack were beer, wine and liquor stores; shoe, clothing accessories and jewellery stores; new car dealers; and home centres and hardware stores. Despite the overall growth in operating profits margins, some major industry groups did not fare as well in 2002 compared with 2001. These included general merchandise stores, home furnishing stores, computer and software stores, and sporting goods, hobby, music and book stores.

Retailers, excluding motor vehicle dealers, kept inventories lean

Overall, inventories rose 10.0% in 2002 to reach $47.7 billion. The inventory build-up in 2002 was largely attributed to new car dealers and used and recreational motor vehicle and parts dealers. Spurred by improved demand in 2002, these retail categories saw their inventories grow 17.5% in 2002.

Excluding new motor vehicle dealers, retailers increased their inventories at about the same rate as the total operating revenue. Closing inventories rose from $28.9 billion in 2001 to $30.7 billion in 2002. The build-up in inventories was broadly spread throughout, with 13 of the 16 trade groups showing increases or no change. Computer and software stores, specialized building material and garden stores, and convenience and specialty food stores had reduced inventories at the end of fiscal year 2002, compared with 2001.

Operating revenues up in all provinces/territories

All provinces and territories posted positive gains in operating revenues in 2002. The Yukon, Northwest Territories and Nunavut combined and Alberta led the way with 12.3% and 7.6% increases in operating revenues, respectively. The strong showings in the territories and Alberta partly as a result of strong gains in residential construction and sales of related household commodities, and increased auto sales. Following closely was Manitoba with 7.5% growth in operating revenues and Ontario at 7.0%.

Definitions, data sources and methods: survey numbers, including related surveys, 2446 and 2448.

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

□

Retail trade by trade group
2002

	Operating revenues	Operating expenses	Gross margin	Operating profit	Operating revenues 2001 to 2002
	$ million				% change
Total	**344,423**	**69,066**	**91,681**	**22,615**	**6.6**
New car dealers	77,577	7,687	10,551	2,864	7.3
Used and recreational motor vehicle and parts dealers	15,189	2,849	3,528	679	9.3
Furniture stores	7,873	2,545	3,068	523	8.0
Home furnishings stores	4,296	1,426	1,682	256	7.2
Computer and software stores	2,635	630	692	63	-4.0
Home electronics and appliance stores	8,382	2,310	2,641	331	13.5
Home centers and hardware stores	13,797	2,559	3,893	1,334	20.9
Specialized building material and garden stores	4,932	1,316	1,491	175	10.8
Supermarkets	54,679	10,764	13,319	2,555	6.5
Convenience and specialty food stores	12,312	2,675	3,284	609	5.7
Beer, wine and liquor stores	12,390	1,725	5,914	4,189	9.9
Pharmacies and personal care stores	21,887	5,598	6,787	1,189	7.5
Gasoline stations	29,330	3,835	7,403	3,568	1.0
Clothing stores	15,153	5,952	6,767	816	2.4
Shoe, clothing accessories and jewellery stores	5,133	1,986	2,391	405	4.4
Sporting goods, hobby, music and book stores	9,225	3,067	3,405	338	3.9
General merchandise stores	38,817	8,014	10,284	2,269	4.1
Miscellaneous store retailers	10,818	4,127	4,580	452	5.8

Retail trade by province and territory
2002

	Number of stores	Operating revenues	Gross margin	Number of stores 2001 to 2002	Operating revenues 2001 to 2002	Operating revenues
		$ million		% change		% share
Canada	**201,995**	**344,423**	**91,681**	**4.3**	**6.6**	**100.0**
Newfoundland and Labrador	3,834	5,386	1,337	3.2	3.4	1.6
Prince Edward Island	985	1,398	351	-1.2	2.4	0.4
Nova Scotia	6,065	10,014	2,688	1.4	5.5	2.9
New Brunswick	4,949	8,049	1,973	2.0	5.9	2.3
Quebec	50,768	78,023	20,134	1.0	6.1	22.7
Ontario	74,754	130,631	36,128	7.1	7.0	37.9
Manitoba	6,424	11,872	3,031	3.3	7.5	3.4
Saskatchewan	6,516	10,221	2,656	2.9	5.9	3.0
Alberta	20,215	42,056	10,562	3.7	7.6	12.2
British Columbia	26,946	45,589	12,465	5.4	5.8	13.2
Yukon, Northwest Territories and Nunavut	539	1,185	356	5.5	12.3	0.3

■

OTHER RELEASES

Study: Innovation in small firms
2002

According to a new study, smaller firms are keeping pace with their larger counterparts in terms of technological innovation.

However, smaller technological innovators were noticeably less likely to use more complex, newer and, at times, more resource-dependent information communications technologies (ICTs), such as intranets and extranets.

According to the study, which analysed data from the 2002 Survey of Electronic Commerce and Technology, these ICTs would need in-house expertise, and possibly readily accessible contract labour, at what might be considered an added cost, with few perceived benefits.

Small firms were less likely to have a presence on the World Wide Web than larger firms in general. However, small technological innovators with 1 to 19 full-time employees were almost twice as likely to have an Internet site and three times more likely to engage in Internet commerce than were their non-innovator counterparts.

Small firms that engaged both in technology acquisition and new products sales were more likely to have a Web presence than their counterparts that made new products sales only, or just acquired technology.

The most readily accessible method of acquiring new technologies—purchasing off-the-shelf technologies—was also the most highly used method by firms of all sizes. For example, small firms veered away from the more complex and more expensive methods of acquiring new technologies since this may not be as cost-effective for them.

Definitions, data sources and methods: survey number 4225.

The working paper *Innovative Firms: A Look at Small Firms* (88F0006XIE2004010, free) is now available online.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Louise Earl (613-951-2880), Science, Innovation and Electronic Information Division. ■

Use of innovative systems and equipment by primary and manufacturing industries to reduce greenhouse gas emissions
2002 (preliminary)

This release refers to information on greenhouse gas emission reductions by primary and manufacturing industries in Canada. The data were collected through the 2002 Survey of Environmental Protection Expenditures.

About one-quarter of businesses in 16 primary and manufacturing industries used innovative systems or equipment between 2000 and 2002 to reduce greenhouse gas emissions. Of them, 13% of these said the impact on their emissions was large.

Fossil-fuel related industries were the most innovative, in terms of introducing new or significantly improved systems or equipment to reduce greenhouse gas emissions. They were led by the pipeline transportation industry, in which 71% of respondents reported introducing these innovative systems. It was followed closely by the oil and gas extraction (65%) and natural gas distribution (58%) industries. Just over one-third of businesses in the petroleum and coal products industry (39%) and pulp, paper and paperboard industry (35%) introduced new or significantly improved systems or equipment.

Almost 9 out of 10 businesses indicated these innovative methods had a small (44%) or medium (44%) impact on overall greenhouse gas emissions. The remainder reported a large impact, led by the electric power generation, transmission and distribution industry, in which 32% of respondents reported a large impact and the natural gas distribution industry (29%).

Economics were both the principal driver and principal obstacle for businesses in the adoption of innovative methods to reduce greenhouse gas emissions. Specifically, sufficient return on investment (54%) was the principal driver for businesses to adopt new or significantly improved systems or equipment to reduce emissions, while the high cost of equipment (51%) and lack of financing (33%) were the principal obstacles. Other principal drivers cited by businesses were corporate policy (44%) and regulations (41%). Less frequently cited drivers were public relations (27%) and voluntary agreements (25%). Almost one-quarter of businesses reported that a lack of information or knowledge related to new or significantly improved systems or equipment to reduce greenhouse gas emissions was an obstacle. A similar proportion of businesses reported that there was a lack of new or significantly improved systems or equipment available on the market.

Between 90% and 95% of businesses in oil and gas extraction, natural gas distribution and pipeline transportation industries reported that they used systems or equipment to reduce their fugitive or vented greenhouse gas emissions in 2002.

Businesses use energy conservation processes and technologies for a variety of reasons, such as reducing pollutants and costs, or improving productivity. The 2002 Survey of Environmental Protection Expenditures asked respondents to indicate from a list what energy conservation processes or technologies they used. Overall, waste-to-energy systems or equipment (14%) was the category most frequently cited by respondents, followed by co-generation (9%) and fuel substitution (8%). Although overall participation rates for waste-to-energy and fuel substitution fell in 2002 compared with 2000, solar energy use grew, particularly in the oil and gas extraction, mining and electric power generation, transmission and distribution industries.

Definitions, data sources and methods: survey number 1903.

Tables from this data release are now available upon request. Information on pollution prevention and environmental management methods used by primary and manufacturing industries are also available.

For more information or to enquire about the concepts, methods or data quality of this release, contact Peter Van Wesenbeeck (613-951-5967) or the information officer (613-951-0297; *environ@statcan.ca*), Environment Accounts and Statistics Division. ■

Stocks of frozen poultry meat

May 1, 2004 (preliminary)

Stocks of frozen poultry meat in cold storage on May 1 totalled 51 860 metric tonnes, down 3.2% from a year ago.

Available on CANSIM: tables 003-0023 and 003-0024.

Definitions, data sources and methods: survey number 3425.

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

Natural gas sales

March 2004 (preliminary)

Natural gas sales totalled 7 457 million cubic metres in March, down 8.7% from March 2003. Warmer-than-normal weather conditions across the country contributed to the weaker sales. The residential sector showed a drop of 14.0%, while the commercial sector had a larger decline of 15.4%. The industrial sector (including direct sales) showed a decrease in sales of 2.2%.

Year-to-date sales at the end of March were down 1.4% from the same period of 2003. Both the residential (-1.3%) and the commercial (-6.0%) sectors posted declines. Use of natural gas by the industrial (including direct sales) sector has edged up 0.8% so far this year.

Natural gas sales

	March 2004^p	March 2003	March 2003 to March 2004
	'000s of cubic metres		% change
Natural gas sales	**7 457 435**	**8 163 880**	**-8.7**
Residential	2 082 658	2 423 056	-14.0
Commercial	1 537 036	1 815 786	-15.4
Industrial	1 794 529	1 774 521	
			-2.2
Direct	2 043 212	2 150 517	
	year-to-date		
	2004^p	2003	2003 to 2004
	'000s of cubic metres		% change
Natural gas sales	**25 492 307**	**25 861 620**	**-1.4**
Residential	7 865 416	7 965 690	-1.3
Commercial	5 694 783	6 055 762	-6.0
Industrial	5 445 006	5 349 694	
			0.8
Direct	6 487 102	6 490 474	

p *Preliminary figures.*

Available on CANSIM: tables 129-0001 to 129-0004.

Definitions, data sources and methods: survey number 2149.

For general information or to order data, contact the dissemination officer (1-866-873-8789; 613-951-9497; *energ@statcan.ca*). To enquire about the concepts, methods or data quality of this release, contact Pierre Després (613-951-3579; *pierre.després@statcan.ca*) or Lloyd Cundell (613-951-7346; *lloyd.cundell@statcan.ca*), Manufacturing, Construction and Energy Division. ■

Steel primary forms, weekly data

Week ending May 15, 2004 (preliminary)

Steel primary forms production for the week ending May 15 totalled 319 416 metric tonnes, up 0.8% from 316 852 tonnes a week earlier and 14.5% from 278 863 tonnes in the same week of 2003.

The year-to-date total as of May 15 was 6 127 084 tonnes, up 1.9% from 6 014 725 tonnes in 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. ■

NEW PRODUCTS

Canada's Balance of International Payments, Fourth quarter 2003, Vol. 51, no. 4
Catalogue number 67-001-XIE ($32/$100).

Science, Innovation and Electronic Information Division Working Papers: Innovative Firms: A Look at Small Firms, 2002, no. 10
Catalogue number 88F0006XIE2004010
(free).

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

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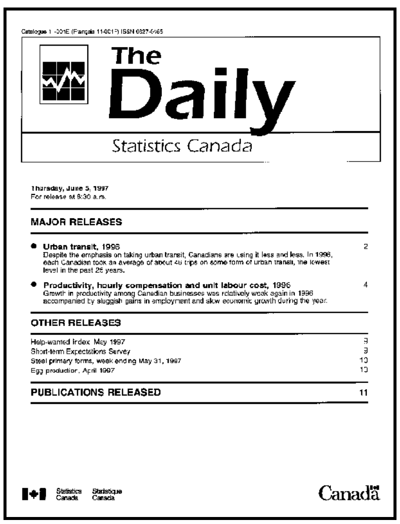
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Statistics Canada

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

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PUBLICATIONS RELEASED 11

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RELEASE DATES: MAY 23 TO MAY 28

(Release dates are subject to change.)

Release date	Title	Reference period
25	**Wholesale Trade**	March 2004
25	**Retail Trade**	March 2004
26	**Characteristics of International Travellers**	Fourth quarter 2003
26	**International Travel Account**	First quarter 2004
26	**Employment Insurance**	March 2004
27	**Farm Cash Receipts**	First quarter 2004
27	**Net Farm Income**	2003
27	**Employment, Earnings and Hours**	March 2004
28	**Industrial Product and Raw Materials Price Indexes**	April 2004
28	**Balance of International Payments**	First quarter 2004