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MAJOR RELEASES

Monthly Survey of Manufacturing

May 2004

With a push from soaring industrial prices, manufacturers chalked up their sixth consecutive increase in shipments, rising 1.1% to $49.1 billion in May. Meanwhile, the level of new orders moderated slightly (-0.8%), the first decline in six months.

Manufacturers' post healthy gains

A robust global economy, coupled with the recent surge in prices for some of Canada's resource-based industries, has generated a momentum in the Canadian manufacturing sector not seen since the economic boom of the late 1990s. During the first five months of 2004, with the trend on a healthy upswing, shipments rose 4.1% compared to the same period in 2003.

Shipments increased in 13 of the 21 manufacturing industries in May, representing 60% of total shipments. Non-durable goods industries jumped by 2.6% to $21.2 billion, boosted by the price-inflated petroleum industry. Durable goods manufacturing was essentially unchanged at $27.9 billion (+0.1%).

Shipments advance in most provinces

Ontario and British Columbia led the eight provinces reporting higher output in May. Ontario's manufacturers posted a fourth straight increase as shipments rose by $458 million (+1.8%) to reach $25.7 billion. Petroleum and motor vehicle manufacturing were the primary contributors.

Strong demand and increasing prices for British Columbia's forestry-related industries anchored healthy gains in May among the province's manufacturers. Shipments were up $134 million (+3.9%) to $3.5 billion, led by significant increases in the shipments of paper and wood products industries.

Partly offsetting Canada's overall increase in May's shipments, manufacturing in Quebec and Alberta slowed down somewhat, following periods of extended expansion. Shipments in Quebec fell by $161 million (-1.4%) to $11.4 billion. Alberta reported their first shipment decline in 10 months (-$86 million, -2.0%); as well, the Territories decreased by $2 million (-22.6%) compared with April.

Note to readers

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 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.

Manufacturing shipments, provinces and territories

	April 2004[r]	May 2004[p]	April to May 2004
	seasonally adjusted		
	$ millions		% change
Canada	**48,575**	**49,124**	**1.1**
Newfoundland and Labrador	249	256	2.8
Prince Edward Island	122	130	6.9
Nova Scotia	783	794	1.5
New Brunswick	1,176	1,283	9.0
Quebec	11,525	11,364	-1.4
Ontario	25,245	25,703	1.8
Manitoba	987	1,035	4.8
Saskatchewan	744	769	3.4
Alberta	4,319	4,233	-2.0
British Columbia	3,415	3,550	3.9
Yukon	1	1	0.8
Northwest Territories including Nunavut	8	6	-26.0

[p] *Preliminary data.*
[r] *Revised data.*

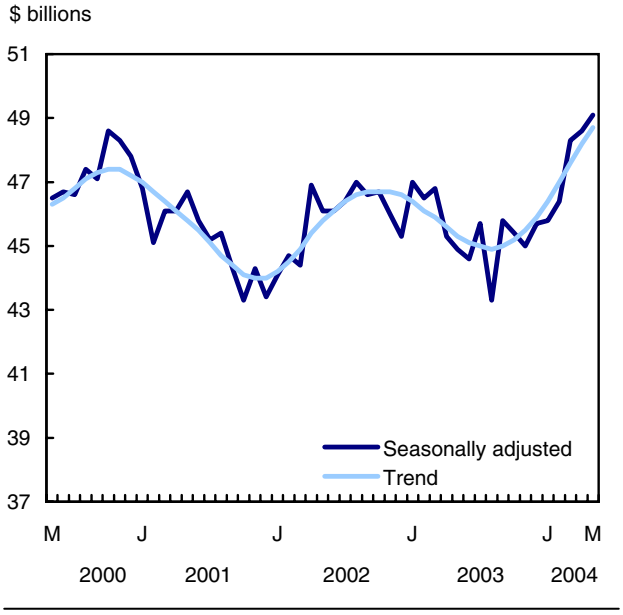
Escalating industrial prices

Prices for petroleum and coal products shot up nearly 10% in May. This is the biggest monthly gain in prices since February 2003. Strong demand, coupled with fears of supply shortages associated with geopolitical tensions in several oil-rich regions around the world, has contributed to the recent run up in prices. Petroleum shipments soared 8.2% to $3.8 billion in May.

Paper manufacturers posted shipments of $2.8 billion, up 4.4%, the highest level in a year. A recent string of order announcements and an upturn in prices contributed to the rising trend in paper manufacturing shipments in 2004.

Motor vehicle manufacturers reported shipments of $6.1 billion (+1.3%) in May, the highest level in almost one year. A boost in retail incentives in the United States seems to have quelled consumers' concerns about higher gasoline prices in May, as retail sales of automobiles rebounded south of the border, compared to May 2003. Several popular models in the United States are manufactured in Canada.

Shipments rise for the sixth month in a row



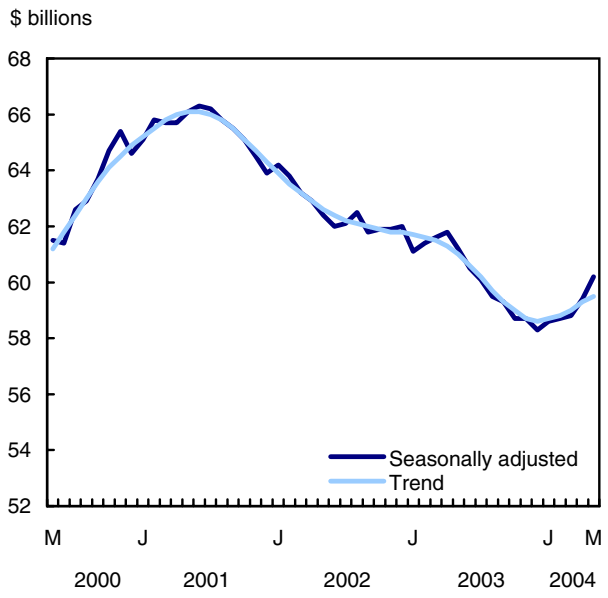
Inventories continue to accumulate

Inventories rose 1.4% to $60.2 billion in May, breaking the $60 billion mark for the first time since July 2003. All three stages of fabrication of inventories contributed to the rise. Improved confidence in the economy saw manufacturers boost raw material inventories to $26.1 billion (+1.4%), following solid increases in March (+1.0%) and April (+1.3%).

Goods-in-process inventories rose by 1.6%, the second increase in a row, while inventories of finished products also shifted up by 1.3% to $20.5 billion, the highest level since last summer.

Increases in inventories were wide ranging in May. Aerospace manufacturing (+5.0%), primary metals (+3.9%) and machinery (+2.3%) were the top contributors.

Manufacturers continue to stock up

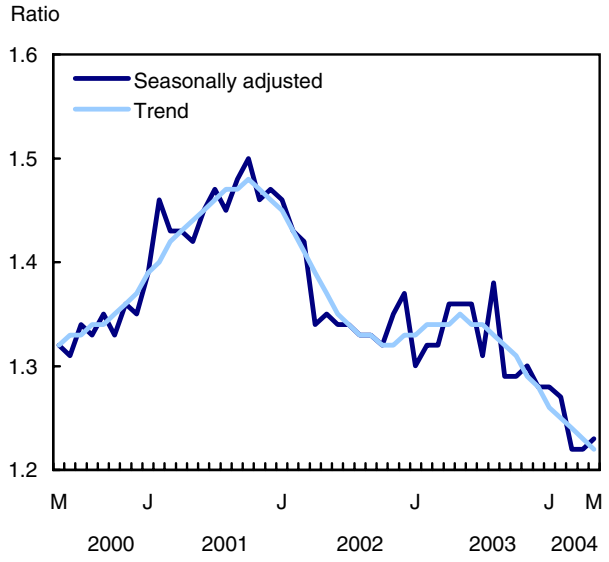


Higher shipments keep the inventory-to-shipment ratio in check

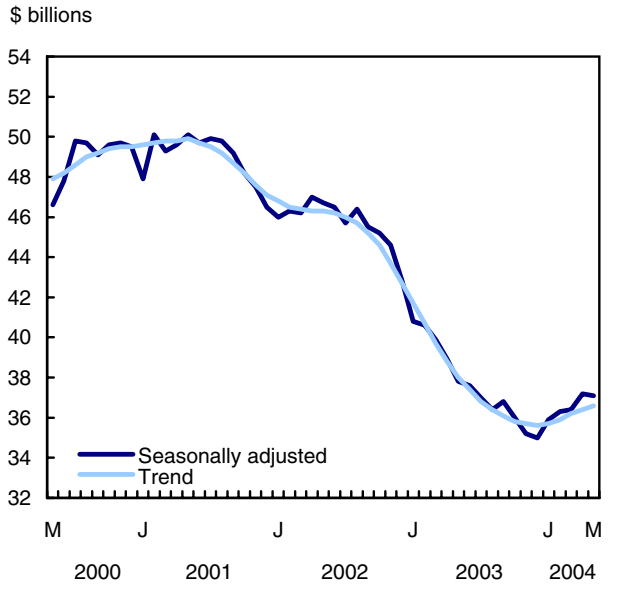
The inventory-to-shipment ratio for May remained just shy of the lowest level on record. The ratio edged up to 1.23 in May from April's 1.22, the lowest ratio since the beginning of the current series in 1992. Shipments and inventories have been rising at a similar pace for the last two months, which has kept the ratio quite stable.

The finished-products inventory-to-shipment ratio remained unchanged at 0.42 for the third consecutive month. The ratio is a key measure of the time (in months) required in order to exhaust inventories if shipments were to remain at their current level.

The inventory-to-shipment ratio edges up slightly from recent low



Unfilled orders edge back



Backlog of orders subsides

Manufacturers reported the first decrease in unfilled orders since December. Orders edged back 0.2% to $37.1 billion, largely because of the aerospace products and parts industry (-2.6%). Excluding the aerospace industry, unfilled orders were up 0.9%.

Since the beginning of the year, unfilled orders have risen by a strong 6.0%, as a result of the robust global economy. However, with the soaring costs of energy and other raw inputs used in manufacturing, the short-term outlook for orders remains undecided.

A build-up in unfilled orders for machinery (+4.2%), fabricated metal products (+2.0%) and motor vehicles (+6.9%) largely offset May's decline in aerospace orders.

Manufacturers receive fewer new orders in May

Following a string of contract signings in recent months, new orders decreased 0.8% to $49 billion in May, the first decline since November. Despite the drop, new orders remain almost 11% above levels of just six months ago.

Decreases in the aerospace (-42.5%), fabricated metal products (-7.1%) and motor vehicle parts (-2.9%) industries contributed.

Manufacturing insights: Canada and US manufacturing activity in synch

With the majority of Canadian exports destined for the American market, the United States is clearly Canada's primary trading partner. During 2003, close to 86% of all merchandise exports was shipped to the United States. Of goods manufactured in Canada, just over half are exported to the United States. Since the US economy is a dominant influence, it might be expected that economic events in the United States will directly impact the Canadian manufacturing sector.

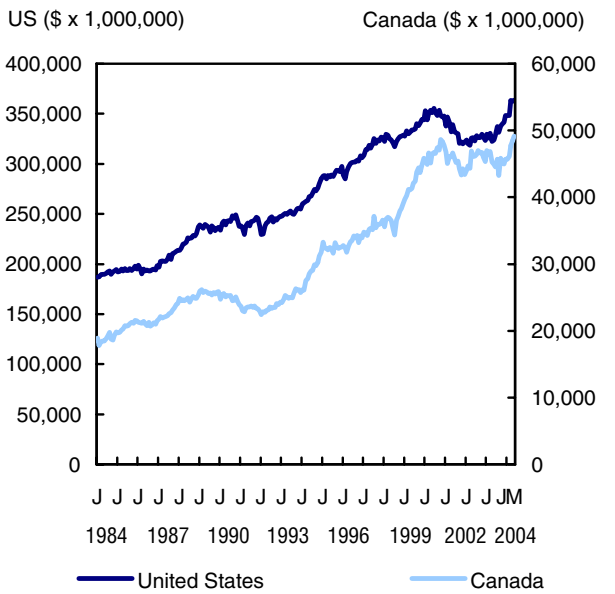
The question arises: Is there a lag between Canadian and US manufacturing trends, and if so, how long does it take Canadian manufacturers to adjust following a shift in the United States? The following is a preliminary review of the trends in manufacturing activity in Canada and the United States. Data from this analysis are from CANSIM tables

304-0002, 304-0003 and 304-0014 and the United States Census Bureau. Additional analysis would be required to fully examine this question.

It could be expected that Canadian manufacturers require some time to respond to changes in US demand, and this would be reflected in their manufacturing data. However, upon examining the monthly levels of manufacturing shipments for both Canada and the United States over the last 20 years, there is no obvious or consistent lag time between US and Canadian manufacturing. In fact, the two countries' manufacturing levels appear to be very much in synch.

The transportation equipment industry comprises a large component of total manufacturing in Canada. This industry operates to a large extent on a just-in-time inventory system. The data were examined excluding transportation equipment, in case this industry was driving the overall trend. Again, there was no lag evident between the two countries over the last 20 years. In fact, even looking as far back as 1970, the movements in shipments are very similar in both countries.

Canada–United States manufacturing shipments



Over the long run, manufacturing in Canada and the United States appears to be in synch, though the magnitude of the upturns or downturns may differ. These differences can be revealed by focussing on the shorter time periods surrounding significant economic turning points.

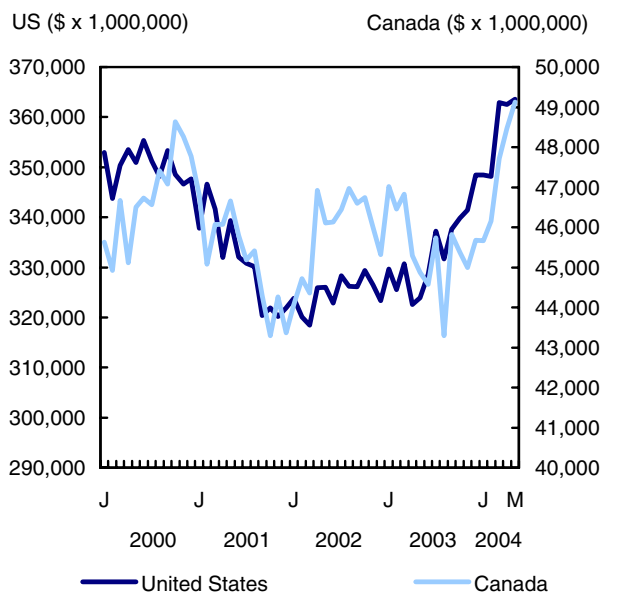
Following the high-tech crash and the slowdown in the global economy in 2001, manufacturing shipments declined in both countries. Canadian shipments decreased 11% from the peak in October 2000 ($48.6 billion) to $43.3 billion in October 2001. Canadian shipments rebounded in 2002 to pre-2000 levels, but fell back in August 2003 ($43.3 billion). Meanwhile, US shipments declined slightly less, but remained depressed far longer. Shipments in the United States declined 10.4% from $355.3 billion in June 2000 to $318.5 billion in March 2002. US manufacturing did recover sooner in 2003 than Canadian manufacturing.

The slower recovery of the Canadian manufacturing sector may have been the result of several unexpected events that battered the economy in 2003, including the mad cow disease crisis, the SARS outbreak and the blackout in Ontario. Other factors that may have affected shipments during this period include increasing globalization and the rising value of the Canadian dollar.

Just-in-time inventory management systems used in certain industries do not appear to be a main factor in the tandem movements in manufacturing activity.

The data for the 2000 to 2004 period appear to show some lag time between declines or increases in the US and Canadian manufacturing levels. However, this period is unique relative to the long-term trend.

Canada–United States manufacturing shipments



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

Definitions, data sources and methods: survey number 2101.

The May 2004 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 upon 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 Manufactures data for reference years 2000 and 2001 and benchmark to 2002.

Data from the July 2004 Monthly Survey of Manufacturing will be released on August 13.

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*). For more information about the Canada–US manufacturing shipments, contact Erik Magnusson (613-951-5707). 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.

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	
May 2003	44,879	-0.9	61,243	-0.9	37,811	-2.7	43,824	-1.1	1.36
June 2003	44,569	-0.7	60,481	-1.2	37,576	-0.6	44,335	1.2	1.36
July 2003	45,735	2.6	60,129	-0.6	37,020	-1.5	45,179	1.9	1.31
August 2003	43,290	-5.3	59,541	-1.0	36,433	-1.6	42,702	-5.5	1.38
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	48,254	4.1	58,780	0.2	36,372	0.1	48,280	3.2	1.22
April 2004	48,575	0.7	59,369	1.0	37,223	2.3	49,426	2.4	1.22
May 2004	49,124	1.1	60,217	1.4	37,133	-0.2	49,034	-0.8	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
May 2003	36,382	-1.0	58,053	-0.9	36,223	-2.7	35,383	-1.2
June 2003	36,263	-0.3	57,338	-1.2	35,984	-0.7	36,024	1.8
July 2003	36,823	1.5	56,984	-0.6	35,446	-1.5	36,285	0.7
August 2003	35,982	-2.3	56,508	-0.8	34,819	-1.8	35,356	-2.6
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	39,573	3.5	55,410	-0.1	34,395	-0.3	39,481	2.3
April 2004	39,788	0.5	55,862	0.8	35,130	2.1	40,523	2.6
May 2004	40,266	1.2	56,744	1.6	35,012	-0.3	40,148	-0.9

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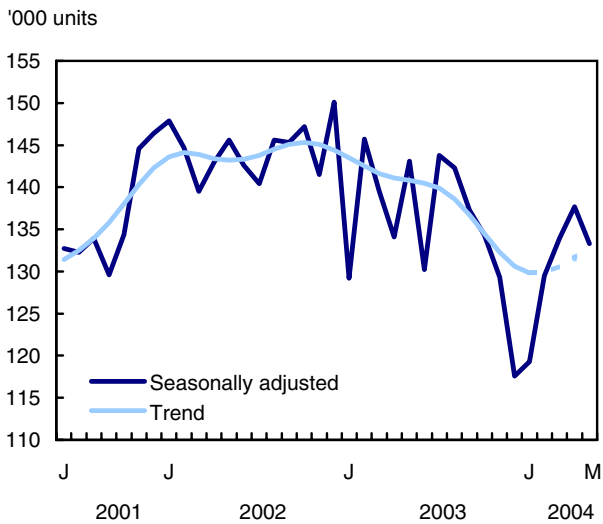
New Motor Vehicle Sales

May 2004

The number of new motor vehicles sold in May retreated 3.2%, primarily as a result of a drop in demand for trucks. This was the first decline in sales this year, following the significant declines that have prevailed through the last half of 2003.

First sales decline in 2004



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

Sales dropped in May to a total of 133,294 vehicles, or 4,361 units less than in April. More than 80% of this reduction came from trucks. The downturn occurred despite generally positive economic conditions, including growth in the number of full-time jobs and continuing incentives offered by car manufacturers.

Based on preliminary automobile industry figures, the number of new motor vehicles sold in June is estimated to have declined approximately 2%, primarily because of weak sales of passenger cars.

Drop in truck sales parallels surge in gasoline prices

The number of new trucks sold in May declined as gas pump prices soared. Trucks include minivans, sport-utility vehicles, light and heavy trucks, vans and buses. New truck sales tapered off 5.5% in May to 62,911 vehicles, or 3,639 units fewer than the previous month. This first monthly decline in sales for 2004 coincided with the steepest average monthly hike (+13.6%) in fuel prices observed in more than 20 years.

The number of new passenger cars sold in May fell 1.0% from April to a total of 70,383 vehicles. The drop was primarily because of the weakness in sales of cars manufactured overseas (-2.1%), which was more significant than sales of North American-built cars (-0.6%).

Sales of both passenger cars and trucks increased during the first four months of 2004, following a period of steep declines in the second half of 2003. This downward movement first emerged in the sale of passenger cars, which began to slow in the fall of 2002. A similar weakness in truck sales only appeared much later. Despite great volatility, truck sales remained generally stable until the fall of 2003.

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.

Newfoundland and Labrador unaffected by decline in sales

The decline in sales affected all provinces in May except Newfoundland and Labrador.

Newfoundland and Labrador was the only province to report an advance (+5.2%) in the number of new motor vehicles sold compared with April. Despite this fourth successive increase, sales in Newfoundland and Labrador have yet to recover from the slowdown that began in the summer of 2003, marking the onset of a period of steep declines.

Nova Scotia (-0.1%), Alberta (-0.6%) and the region consisting of British Columbia and the Territories (-1.1%) reported smaller declines than the national average (-3.2%).

Of the other provinces posting steeper declines, those recorded in Ontario (-3.5%), Quebec (-4.2%) and Manitoba (-8.3%) followed a period of four uninterrupted monthly advances.

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

Definitions, data sources and methods: survey number 2402.

The May 2004 issue of *New Motor Vehicle Sales* (63-007-XIE, $14/$133) will soon be available.

Data on new motor vehicle sales for June 2004 will be released on August 16.

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 Clérance Kimanyi (613-951-6363), Distributive Trades Division.

New motor vehicle sales

	May 2003	April 2004[r]	May 2004[p]	May 2003 to May 2004	April to May 2004
	seasonally adjusted				
	number of vehicles			% change	
New motor vehicles	**143,104**	**137,655**	**133,294**	**-6.9**	**-3.2**
Passenger cars	75,532	71,106	70,383	-6.8	-1.0
North American[1]	54,128	49,839	49,562	-8.4	-0.6
Overseas	21,404	21,266	20,821	-2.7	-2.1
Trucks, vans and buses	67,572	66,550	62,911	-6.9	-5.5
New motor vehicles					
Newfoundland and Labrador	2,109	1,881	1,978	-6.2	5.2
Prince Edward Island	429	467	389	-9.3	-16.7
Nova Scotia	3,950	3,834	3,830	-3.0	-0.1
New Brunswick	3,338	2,910	2,644	-20.8	-9.1
Quebec	36,897	35,794	34,308	-7.0	-4.2
Ontario	56,881	53,615	51,754	-9.0	-3.5
Manitoba	4,083	4,184	3,836	-6.0	-8.3
Saskatchewan	3,501	3,358	3,196	-8.7	-4.8
Alberta	16,929	16,283	16,193	-4.3	-0.6
British Columbia[2]	14,988	15,331	15,166	1.2	-1.1

	May 2003	April 2004[r]	May 2004[p]	May 2003 to May 2004
	unadjusted			
	number of vehicles			% change
New motor vehicles	**185,419**	**160,195**	**166,143**	**-10.4**
Passenger cars	103,507	86,641	93,328	-9.8
North American[1]	74,880	59,271	67,222	-10.2
Overseas	28,627	27,370	26,106	-8.8
Trucks, vans and buses	81,912	73,554	72,815	-11.1
New motor vehicles				
Newfoundland and Labrador	3,201	2,383	2,807	-12.3
Prince Edward Island	615	524	499	-18.9
Nova Scotia	6,021	5,007	5,651	-6.1
New Brunswick	4,758	3,690	3,619	-23.9
Quebec	51,074	45,878	44,593	-12.7
Ontario	70,440	59,184	62,059	-11.9
Manitoba	5,104	4,661	4,624	-9.4
Saskatchewan	4,163	3,784	3,629	-12.8
Alberta	21,454	18,502	20,063	-6.5
British Columbia[2]	18,589	16,582	18,599	0.1

[p] *Preliminary figures.*
[r] *Revised figures.*
1. *Manufactured or assembled in Canada, the United States or Mexico.*
2. *Includes Yukon, the Northwest Territories and Nunavut.*

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OTHER RELEASES

Federal government payments to industry for science and technology

1997/98 to 2001/02

The federal government distributed $4.5 billion to business enterprises for scientific and technological activities in the five-year period between 1997/98 and 2001/02.

The bulk of the money, about 71%, went to two sectors. The manufacturing sector obtained $1.8 billion and the services sector received just under $1.4 billion.

Federal government payments were concentrated in five major industries. The aerospace products and parts industry received the largest portion of federal science and technology payments, about $700 million over the five-year period.

The central activity for scientific and technological activities is research and development. In 2001/02, Industry Canada accounted for 51% of research and development payments to business enterprises. The Canadian Space Agency accounted for 16%, and the Defence Department, 12%.

Ontario accounted for 51% of all research and development activity in Canada, with the largest concentration in architectural, engineering and related services and the communications equipment industry. About 83% of research and development payments to the aerospace products and parts industry were concentrated in Quebec.

Definitions, data sources and methods: survey number 4212.

The working paper, *Federal Government Payments to Industry, 1997/98 to 2001/02* (88F0006XIE2004012, free) is now available online.

For more information, or to enquire about the methods, concepts or data quality of this release, contact Lloyd Lizotte (613-951-2188; *lloyd.lizotte@statcan.ca*) or Antoine Rose (613-951-9919; *antoine.rose@statcan.ca*), Science, Innovation and Electronic Information Division. ■

Longitudinal Administrative Databank

1982 to 2002

Data for 2002 have been added to the Longitudinal Administrative Databank (LAD). This databank now spans 21 years, from 1982 to 2002, and contains information about individuals and census families.

The LAD consists of a 20% longitudinal sample of Canadian taxfilers and provides researchers and analysts with a tool for studying the changes in income experienced by individuals and their families. The LAD contains a wide variety of income and demographic variables such as employment income, self-employment income, RRSPs contributions, alimony, age, sex, and census family composition. The large sample (4.7 million persons in 2002) ensures reliable estimates for Canada, the provinces, census metropolitan areas, and several subprovincial regions, based on aggregations of postal codes.

Definitions, data sources and methods: survey number 4107.

The 2002 version of the *Longitudinal Administrative Data Dictionary* (12-585-XIE, free) is now available online.

Custom tabulations including 2002 data are now available (13C0019, variable prices).

For more information, or to enquire about the concepts, methods or data quality of this release, contact Client Services (1-866-652-8443; 613-951-9720; fax: 1-866-652-8444 or 613-951-4745; *saadinfo@statcan.ca*), Small Area and Administrative Data Division. ■

Aircraft movement statistics: Major airports

April 2004

The April 2004 monthly report, Vol. 1 (TP 141, free) is available on Transport Canada's website: (*http://www.tc.gc.ca/pol/en/Report/tp141e/tp141.htm*).

Note: The TP 141 monthly report is issued in two volumes. Volume 1 presents statistics for the major Canadian airports (i.e., those with NAV CANADA air-traffic control towers or flight service stations). Volume 2 presents statistics for the smaller airports (i.e., those without air-traffic control towers). Both volumes are available free upon release on Transport Canada's website.

For more information about this website, contact Michel Villeneuve (613-990-3825; *villenm@tc.gc.ca*) or Sheila Rajani (613-993-9822; *rajanis@tc.gc.ca*), Transport Canada.

Definitions, data sources and methods: survey number 2715.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Kathie Davidson (613-951-0141; fax: 613-951-0010; *aviationstatistics@statcan.ca*), Transportation Division. ■

Refined petroleum products

March 2004

Data on the supply and disposition and domestic sales of refined petroleum products for March are now available.

Available on CANSIM: tables 134-0001 to 134-0004.

Definitions, data sources and methods: survey number 2150.

The March 2004 issue of *Refined Petroleum Products*, Vol. 59, no. 3 (45-004-XIB, $18/$166) 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; *energ@statcan.ca*), Manufacturing, Construction and Energy Division. ■

NEW PRODUCTS

Analytical Studies Branch Research Paper Series: The Deteriorating Economic Welfare of Immigrants and Possible Causes, no. 222
Catalogue number 11F0019MIE2004222
(free).

Longitudinal Administrative Data Dictionary, 1982 to 2002
Catalogue number 12-585-XIE
(free).

Refined Petroleum Products, March 2004, Vol. 59, no. 3
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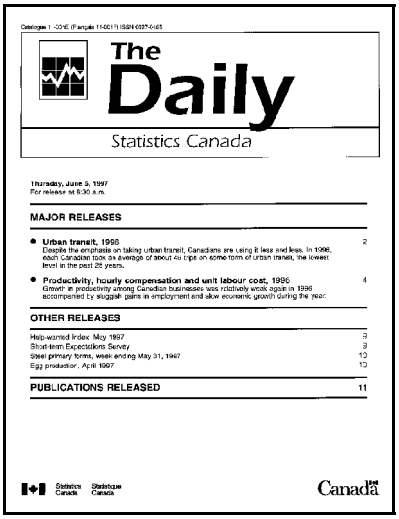

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