Catalogue 11-001-XIE (Français 11-001-XIF) ISSN 0827-0465

The Daily

Statistics Canada

Friday, January 21, 2005
Released at 8:30 a.m. Eastern time

Major releases

Other releases

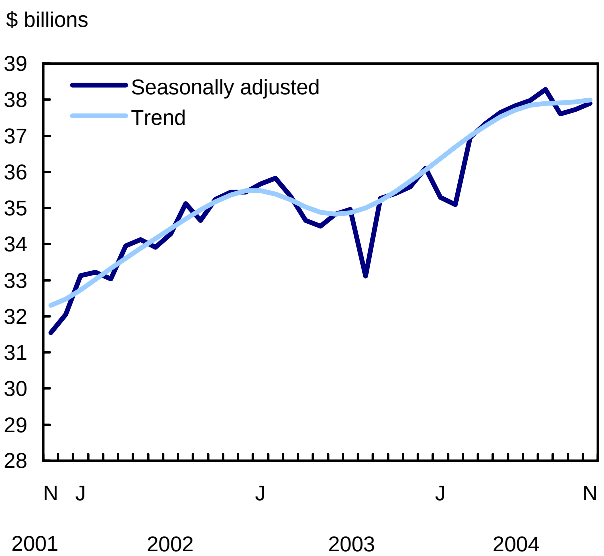
Major releases

Wholesale trade

November 2004

Wholesalers sold goods and services worth $37.9 billion in November, up 0.5% compared with October. The increases in October and November were not enough to recover the ground lost in September, when wholesale sales experienced a steep drop (-1.7%). Previously, total wholesale sales had generally been rising since September 2003.

Wholesale sales have still not recovered from the loss in September



In November, 9 of the 15 trade groups, whose sales accounted for 48% of total sales, posted gains. The groups contributing the most to the increase were household and personal goods (+6.5%) and computers and other electronic equipment (+2.9%). The automotive group (-1.4%) and the "other products" category (-1.3%) registered the steepest declines.

In constant dollars, wholesale sales rose 1.9% in November.

Sales up in the personal and household goods sector

Sales of household goods rose 6.5%, partially offsetting the poor showing in October (-7.8%). A number of new products (such as digital cameras and game consoles) and new promotions were launched in November. After generally posting robust growth starting in mid-2003, sales appear to have levelled off since mid-2004.

Pharmaceutical wholesalers also posted higher sales, albeit a more modest advance of 1.0%. This increase followed a substantial rise in October (+4.5%). This group’s monthly growth, which was very strong in 2003, began to slow down in 2004, in part because manufacturers faced tighter controls on Internet sales targeting the US market.

Weak demand from Canadian consumers continues to dampen the automotive sector

New motor vehicle sales continued to post slack sales (-1.4%), owing in part to weak domestic demand for new cars. Between September 2001 and February 2003, wholesale sales of motor vehicles surged following the introduction of different types of incentives. Subsequently, sales began to slump and were having trouble making up the lost ground.

Wholesale sales of motor vehicle parts and accessories grew 3.9%. Since September 2003, the value of sales in this sector has generally been rising. Previously, sales went through a period of decline starting in November 2002.

Sales of products related to the agricultural industry pull down the "other products" sector

Sales of "other products" fell 1.3% in November. This drop is attributable to various components of the sector, including products related to the agricultural industry (such as seed and fertilizer as well as chemical products and other agricultural supplies) and recycled metals. However, wholesalers of these products enjoyed a strong increase in October. Since September 2003, sales in this sector have generally been rising, buoyed by an increase in the prices of some of its components, including agricultural chemical products and recycled metals.

Manitoba and Saskatchewan make the best showings

Manitoba wholesalers saw their first sales increase (+6.1%) in three months in November. Increases were observed in numerous sectors, including farm products and food products. From January to November 2004, sales in Manitoba were up 4.7% over the same period in 2003.

Saskatchewan wholesalers posted a strong increase in sales in November (+5.0%), the third gain in the past four months. The increase was attributable to the "other products" category and to machinery and equipment. Wholesale sales in Saskatchewan have generally been rising since March 2004, following a period of contraction that began in March 2003.

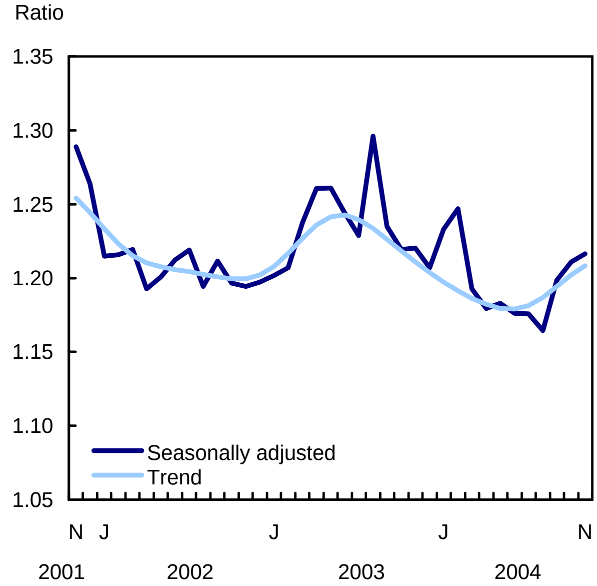
The province experiencing the greatest contraction was British Columbia (-2.4%). The decrease in that province may be largely attributable to computers and other electronic equipment and to lumber and millwork. Together, these two groups account for some 20% of British Columbia's wholesale trade. Despite this drop in November, the province's sales were 9.2% higher in the first 11 months of 2004 than in the same period in 2003.

Inventories continue to rise

Inventories registered a third consecutive rise in November (+0.9%). The increase was mainly attributable to machinery and equipment, the "other products" category and motor vehicles. Together, these groups account for approximately 40% of total inventories of wholesalers. The trend in total inventories has generally been upward since November 2003, following a five-month period when wholesalers reduced their inventories.

The increase in inventories, combined with a smaller increase in sales, caused the inventory-to-sales ratio to rise from 1.21 in October to 1.22 in November. Since September 2004, the ratio has followed a slight upward trend after a period of decreases that began in October 2003.

Inventory-to-sales ratio continues to rise



Available on CANSIM: tables 081-0007 to 081-0010.

Definitions, data sources and methods: survey number 2401.

The November 2004 issue of *Wholesale Trade* (63-008-XIE, $15/$150) will soon be available.

Wholesale trade estimates for December 2004 will be released on February 18.

For data or general information, contact Client Services (1-877-421-3067; 613-951-3549; *wholesaleinfo@statcan.ca*). To enquire about the concepts, methods or data quality of this release, contact Jean Lebreux (613-951-4907; *jean.lebreux@statcan.ca*), Distributive Trades Division.

□

Wholesale merchants' sales

	November 2003	August 2004[R]	September 2004[R]	October 2004[R]	November 2004[P]	October 2004 to November 2004	November 2003 to November 2004
	seasonally adjusted						
	$ millions					% change	
Total, wholesale sales	**35,589**	**38,280**	**37,612**	**37,719**	**37,893**	**0.5**	**6.5**
Farm products	**407**	**457**	**457**	**455**	**466**	**2.5**	**14.7**
Food, beverages and tobacco products	**7,047**	**7,186**	**7,144**	**7,094**	**7,065**	**-0.4**	**0.2**
Food products	6,427	6,532	6,476	6,435	6,429	-0.1	0.0
Alcohol and tobacco	621	654	668	659	636	-3.6	2.4
Personal and household goods	**4,866**	**5,102**	**5,203**	**5,097**	**5,260**	**3.2**	**8.1**
Apparel	727	682	705	700	701	0.1	-3.6
Household and personal products	2,177	2,310	2,329	2,148	2,288	6.5	5.1
Pharmaceuticals	1,962	2,110	2,169	2,249	2,272	1.0	15.8
Automotive products	**7,330**	**7,671**	**7,330**	**7,338**	**7,314**	**-0.3**	**-0.2**
Motor vehicles	5,955	6,118	5,836	5,823	5,740	-1.4	-3.6
Motor vehicle parts and accessories	1,375	1,553	1,494	1,515	1,575	3.9	14.6
Building materials	**4,487**	**5,249**	**5,223**	**5,356**	**5,316**	**-0.7**	**18.5**
Building supplies	2,692	2,901	2,919	2,957	2,962	0.2	10.0
Metal products	853	1,213	1,196	1,248	1,248	0.0	46.3
Lumber and millwork	942	1,135	1,107	1,151	1,107	-3.9	17.5
Machinery and electronic equipment	**7,235**	**8,029**	**8,011**	**7,901**	**8,048**	**1.9**	**11.2**
Machinery and equipment	2,954	3,383	3,529	3,488	3,520	0.9	19.2
Computer and other electronic equipment	2,631	2,896	2,670	2,687	2,764	2.9	5.1
Office and professional equipment	1,650	1,750	1,812	1,726	1,764	2.2	6.9
Other products	**4,219**	**4,586**	**4,244**	**4,479**	**4,423**	**-1.3**	**4.8**
Sales, province and territory							
Newfoundland and Labrador	214	202	189	205	205	-0.3	-4.4
Prince Edward Island	47	49	49	48	49	0.1	4.3
Nova Scotia	529	514	504	510	507	-0.6	-4.2
New Brunswick	447	444	451	438	439	0.4	-1.8
Quebec	6,748	7,331	7,370	7,414	7,447	0.4	10.4
Ontario	18,740	19,966	19,322	19,222	19,343	0.6	3.2
Manitoba	880	980	939	908	963	6.1	9.5
Saskatchewan	995	1,026	1,075	1,069	1,123	5.0	12.9
Alberta	3,578	3,962	3,955	4,064	4,067	0.1	13.7
British Columbia	3,391	3,781	3,731	3,814	3,722	-2.4	9.8
Yukon	7	7	7	7	9	36.9	39.4
Northwest Territories	13	16	15	17	16	-5.3	20.0
Nunavut	2	2	5	3	3	1.1	46.3

r *Revised figures.*
p *Preliminary figures.*

Wholesale merchants' inventories and inventory-to-sales ratio

	November 2003	August 2004R	September 2004R	October 2004R	November 2004P	October 2004 to November 2004	November 2003 to November 2004	October 2004R	November 2004P
	Wholesale inventories							Inventory-to-sales ratio	
	seasonally adjusted								
	$ millions					% change			
Inventories	**43,428**	**44,578**	**45,082**	**45,677**	**46,094**	**0.9**	**6.1**	**1.21**	**1.22**
Farm products	100	156	168	164	165	0.6	64.0	0.36	0.35
Food products	4,820	4,389	4,332	4,318	4,310	-0.2	-10.6	0.67	0.67
Alcohol and tobacco	280	294	317	343	318	-7.3	13.7	0.52	0.50
Apparel	1,433	1,431	1,431	1,431	1,448	1.2	1.0	2.04	2.07
Household and personal products	3,240	3,343	3,274	3,309	3,276	-1.0	1.1	1.54	1.43
Pharmaceuticals	2,222	2,633	2,667	2,667	2,707	1.5	21.8	1.19	1.19
Motor vehicles	4,136	3,856	4,145	4,071	4,164	2.3	0.7	0.70	0.73
Motor vehicle parts and accessories	2,967	3,207	3,062	3,227	3,213	-0.4	8.3	2.13	2.04
Building supplies	4,362	4,274	4,354	4,399	4,432	0.7	1.6	1.49	1.50
Metal products	1,520	2,089	2,224	2,345	2,420	3.2	59.2	1.88	1.94
Lumber and millwork	847	1,112	1,092	1,129	1,076	-4.7	27.0	0.98	0.97
Machinery and equipment	8,077	8,380	8,525	8,526	8,738	2.5	8.2	2.44	2.48
Computer and other electronic equipment	1,684	1,378	1,413	1,385	1,383	-0.1	-17.9	0.52	0.50
Office and professional equipment	2,438	2,510	2,394	2,504	2,471	-1.3	1.4	1.45	1.40
Other products	5,301	5,526	5,686	5,860	5,974	1.9	12.7	1.31	1.35

r *Revised figures.*
p *Preliminary figures.*

■

Other releases

Annual Survey of Accounting and Bookkeeping Services
2003

The accounting and bookkeeping industry rebounded from the shock of scandals that resulted in the dissolution of a major professional accounting firm in 2002. Operating revenues increased 6.4% to $8.36 billion in 2003.

Corporate and personal tax services accounted for the majority of revenue growth, up $413 million to $2.1 billion in 2003. This represents 28% of industry operating revenues. However, traditional accounting and auditing services remain the backbone of the profession, generating 56% of revenues in 2003. Consulting services maintained their share of revenues at 7.6%.

Approximately half of the industry's operating revenues were generated by firms located in Ontario, followed by Quebec at 19%, British Columbia at 12%, and Alberta at 11%. Revenues increased in Ontario (+7%), Quebec (+9%) and Alberta (+13%), but were down slightly in British Columbia (-1%).

The accounting industry relies heavily on human capital. In 2003, approximately 68,000 workers were employed by firms in the industry. Salaries remained the single largest expense item of these firms, comprising 54% of total industry operating expenses. Spending on salaries and wages increased to $3.2 billion in 2003, up 6% from the previous year. These figures do not include the contribution of approximately 11,000 partners and working proprietors.

The industry's pre-tax operating profit margin was unchanged from 2002 (29%).

Market share of the 20 largest firms represented 48% of operating revenues in 2003, unchanged from the previous year.

Available on CANSIM: table 360-0007.

Definitions, data sources and methods: survey number 4716.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Nissa Kenney (613-951-5250; fax: 613-951-6696; *nissa.kenney@statcan.ca*), Service Industries Division. ■

Annual Survey of Surveying and Mapping Services
2003

The surveying and mapping industry is composed primarily of two different activities, namely geophysical surveying, which provides services to the mineral, oil and gas industry, and land surveying. This industry generated $1.87 billion in operating revenues in 2003, up 1.8% over 2002.

Land surveying revenues rose as housing starts continued to rise in 2003, triggering increased demand for land surveying services in the form of cadastral surveys. Firms classified under surveying and mapping (except geophysical) services consequently increased their operating revenues to $888 million in 2003, up from $822 million in 2002.

Operating revenue from firms classified under geophysical surveying and mapping services dropped from $1.01 billion in 2002 to $977 million in 2003.

Alberta continues to lead all provinces in total surveying and mapping services, accounting for $1.2 billion or 63% of operating revenues earned in 2003 — unchanged from 2002.

Alberta-based firms accounted for 88% of all geophysical surveying services in Canada, demonstrating a direct link with the oil and gas industry, primarily based in Alberta. One must note that this includes not only work performed in Alberta proper, but also work conducted by Alberta-based companies in other provinces, offshore, and in other countries.

The industry's before-tax operating profit margin was 8.7% in 2003, relatively unchanged from 8.5% in 2002.

The top 20 firms generated 37.9% of operating revenue, only marginally less than 2002, when they accounted for 38.5%. These firms also accounted for 29.5% of salaries and 38.9% of all operating expenses. Their share of operating profits decreased from 31.5% in 2002 to 27.2% in 2003.

Available on CANSIM: table 360-0006.

Definitions, data sources and methods: survey number 4715.

For more information or to enquire about the concepts, methods or data quality of this release, contact Michel Savard (613-951-3175; fax: 613-951-6696; *michel.savard@statcan.ca*), Service Industries Division. ■

Aircraft movement statistics

December 2004 (preliminary)

The 42 Canadian airports with NAV CANADA air traffic control towers reported 265,740 take-offs and landings in December, down 10.9% compared with December 2003 (298,217) and the tenth consecutive decrease in year-over-year comparisons of monthly movements. Year-over-year decreases in aircraft movements were reported by 30 airports in December 2004 compared with December 2003. Declines of greater than 20% were reported by 14 airports this month compared with 6 airports in November.

Itinerant movements (flights from one airport to another) decreased by 5.2% (-11,345 movements) in December 2004 compared with December 2003. Local movements (flights that remain in the vicinity of the airport) declined by 26.3% (-21,132 movements) in December 2004, the tenth consecutive monthly decrease.

The top 10 airports in terms of volumes of itinerant movements in December showed year-over-year variations ranging from an 8.4% increase (+2,583 movements) at Toronto/Lester B. Pearson International to a decline of 4.6% (-225 movements) at Québec/Jean Lesage International. Of the top 10 airports, 4 recorded increases in itinerant movements compared with 8 airports in November 2004.

The top 10 airports in terms of local movements showed year-over-year variations ranging from a 39.9% increase (+1,294 movements) at Victoria International to a decline of 45.0% (-2,781 movements) at Calgary/Springbank. Of the top 10 airports, 5 recorded decreases in local movements compared with 6 airports in November 2004.

The December issue of *Aircraft Movement Statistics*, Vol. 3, no. 12 (51F0001PIE, TP1496, free) is now available on our Web site. From the *Our products and services* page, choose *Free*, then *Transport and warehousing*.

Preliminary statistics for the 56 Canadian airports with NAV CANADA flight service stations are also available for December.

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. ■

Steel pipe and tubing

November 2004

Data on production and shipments of steel pipe and tubing are now available for November.

Available on CANSIM: table 303-0046.

Definitions, data sources and methods: survey number 2105.

The November 2004 issue *Production and Shipments of Steel Pipeand Tubing*, Vol. 28, no. 11 (41-011-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. ■

Steel primary forms, weekly data

Week ending January 15, 2005 (preliminary)

Steel primary forms production for the week ending January 15 totalled 320 005 metric tonnes, up 11.1% from 288 100 tonnes a week earlier and up 10.3% from 290 061 tonnes in the same week of 2004.

The year-to-date total as of January 15 was 647 364 tonnes, down 10.6% from 724 206 tonnes in the same period of 2004.

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

Canadian Economic Observer, January 2005, Vol. 18, no. 1
Catalogue number 11-010-XPB ($25/$243).

Value of Farm Capital: Agriculture Economic Statistics, November 2004, Vol. 3, no. 2
Catalogue number 21-013-XIE
(free).

Farm Debt Outstanding: Agriculture Economic Statistics, November 2004, Vol. 3, no. 2
Catalogue number 21-014-XIE
(free).

Direct Payments to Agriculture Producers: Agriculture Economic Statistics, November 2004, Vol. 3, no. 2
Catalogue number 21-015-XIE
(free).

Monthly Survey of Manufacturing, November 2004, Vol. 58, no. 11
Catalogue number 31-001-XIE ($17/$158).

Production and Shipments of Steel Pipe and Tubing, November 2004, Vol. 28, no. 11
Catalogue number 41-011-XIB ($6/$51).

Aircraft Movement Statistics, December 2004, Vol. 3, no. 12
Catalogue number 51F0001PIE
(free).

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.

How to order products

To order by phone, please refer to:

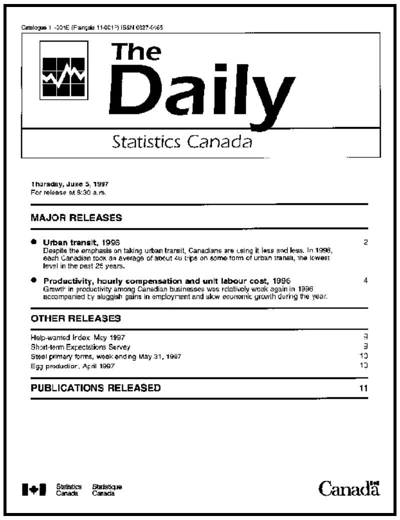
- The title
- The catalogue number
- The volume number
- The issue number
- Your credit card number.

From Canada and the United States, call:	**1-800-267-6677**
From other countries, call:	**1-613-951-7277**
To fax your order, call:	**1-877-287-4369**
For address changes or account inquiries, call:	**1-800-700-1033**

To order by mail, write to: Statistics Canada, Circulation Management, Dissemination Division, Ottawa, K1A 0T6. Include a cheque or money order payable to **Receiver General of Canada/Publications**. Canadian customers add 7% GST and applicable PST.

To order by Internet, write to: *infostats@statcan.ca* or download an electronic version by accessing Statistics Canada's website *(www.statcan.ca).* From the *Our products and services* page, under *Browse our Internet publications*, choose *For sale*.

Authorized agents and bookstores also carry Statistics Canada's catalogued publications.



Catalogue 11-001E (Français 11-001F) ISSN 0827-0465

The Daily

Statistics Canada

Thursday, June 5, 1997
For release at 8:30 a.m.

MAJOR RELEASES

- **Urban transit,** 1996 2
  Despite the emphasis on taking urban transit, Canadians are using it less and less. In 1996, each Canadian took an average of about 46 trips on some form of urban transit, the lowest level in the past 25 years.
- **Productivity, hourly compensation and unit labour cost,** 1996 4
  Growth in productivity among Canadian businesses was relatively weak again in 1996 accompanied by sluggish gains in employment and slow economic growth during the year.

OTHER RELEASES

Help-wanted Index, May 1997	9
Short-term Expectations Survey	9
Steel primary forms, week ending May 31, 1997	10
Egg production, April 1997	10

PUBLICATIONS RELEASED 11

Statistics Canada Statistique Canada

Canada

Statistics Canada's official release bulletin

Catalogue 11-001-XIE.

Published each working day by the Communications Division, Statistics Canada,
10-H, R.H. Coats Bldg., Tunney's Pasture, Ottawa, Ontario K1A 0T6.

To access *The Daily* on the Internet, visit our site at *http://www.statcan.ca*. To receive *The Daily* each morning by e-mail, send an e-mail message to *listproc@statcan.ca.* Leave the subject line blank. In the body of the message, type "subscribe daily firstname lastname".

Release dates: January 24 to 28

(Release dates are subject to change.)

Release date	Title	Reference period
24	**Retail trade**	November 2004
25	**Employment Insurance**	November 2004
26	**Study: Are good jobs disappearing in Canada?**	1981 to 2004
27	**Business Conditions Survey: Canadian manufacturing industries**	January 2005
27	**Government expenditures on culture**	2002/03
27	**Employment, earnings and hours**	November 2004
28	**Industrial product and raw materials price indexes**	December 2004