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The Daily

Statistics Canada

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Releases

Releases

Business Conditions Survey: Manufacturing industries

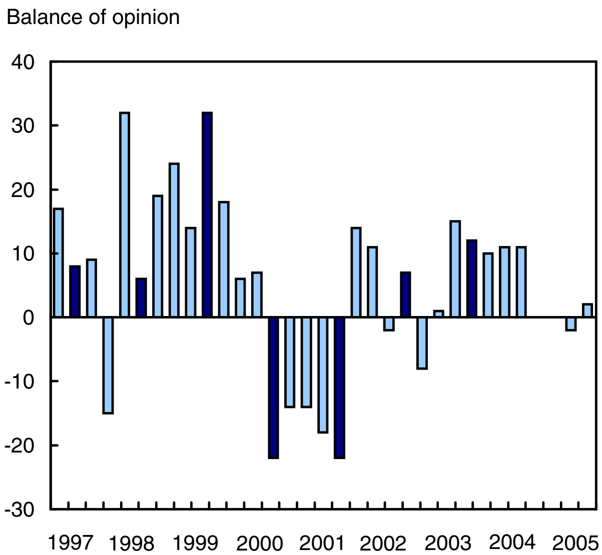
October 2005

Based on increases in new orders, a higher backlog of unfilled orders and a decline in finished product inventories, manufacturers were slightly more bullish about production prospects for the last quarter of 2005.

While national employment prospects remained slightly negative for the fourth quarter, there were significant divergences in opinions towards employment prospects expressed by manufacturers in Western Canada versus those in Central Canada.

The voluntary survey conducted in the first two weeks of October, to which almost 4,000 manufacturers responded, requests opinions on production impediments, finished product inventory levels, new and unfilled order levels, and production and employment prospects in the coming three months.

Balance of opinion for expected volume of production next three months versus last three



Manufacturers slightly more bullish about production prospects

In October, 17% of manufacturers stated they would increase production in the fourth quarter while 15% expected to decrease production, leaving the balance of opinion at +2. This was a 4 point increase from the -2 balance posted in the July survey. This was the first positive balance for production prospects since October 2004 (+11).

Led by producers in the transportation equipment, computer and electronic products and primary metal industries, 9 of the 21 manufacturing industries contributed to the more positive balance in production prospects. A lack of capacity continued to be an issue for some manufacturers. According to the Industrial Capacity Utilization Rates, manufacturers operated at a near record 86.7% of capacity in the second quarter of 2005.

The balance of opinion is determined by subtracting the proportion of manufacturers who stated production would decrease in the coming three months from the proportion who stated production would be increasing.

> ***Note to readers***
>
> *The Business Conditions Survey is conducted in January, April, July and October; the majority of responses are recorded in the first two weeks of these months. Results are based on replies from about 4,000 manufacturers and are weighted by a manufacturer's shipments or employment. Consequently, larger manufacturers have a correspondingly larger impact on the results than smaller manufacturers.*
>
> *Except for the data on production difficulties, data in this release are seasonally adjusted.*

Satisfaction with level of orders received is improving

Following three consecutive negative quarters, the October balance of opinion on the current level of orders received jumped 13 points to +4. Although positive, it was still lower than the +13 balance posted in the October 2004 survey. The number of manufacturers who stated that orders received were declining was just 10% in October, a significant improvement from 22% in July. Producers in the transportation equipment, electric equipment, fabricated metal products and computer and electronic products industries were the major contributors to the improved balance of opinion for orders received. According to August's Monthly Survey of Manufacturing, new orders for all manufacturing industries jumped 3.4% to just under $52.7 billion, the third increase in the last four months.

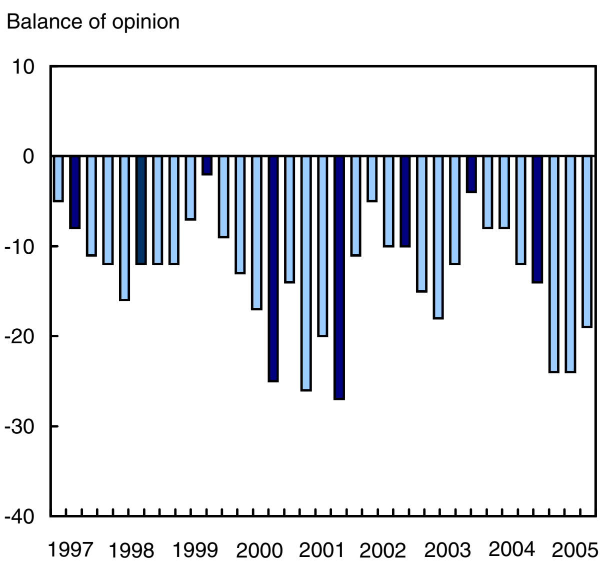
Manufacturers split on concerns with levels of unfilled orders

With 20% of manufacturers expressing a lower-than-normal backlog and 20% stating a higher-than-normal backlog, the balance of opinion concerning the current level of unfilled orders stood at zero in October. This was a 5 point improvement from the July survey results. Producers in the primary metals, fabricated metal products, and plastics and rubber products industries were the major contributors to the improvement in the unfilled orders balance of opinion. According to August's Monthly Survey of Manufacturing, unfilled orders picked up 1.9% to $42.2 billion — the sixth consecutive increase.

Manufacturers less concerned with finished product inventories

In October, 67% of manufacturers reported that the current level of finished product inventories was about right, down 5 points from the July level. Some 26% stated that inventories were too high, while 7% said inventories were too low. This left the balance of opinion at -19, a 5 point improvement over the July balance. According to August's Monthly Survey of Manufacturing, finished product inventories edged down 0.3% to $22.2 billion — the first decrease since March 2005.

Balance of opinion for current level of finished-product inventory on hand



Manufacturers' employment prospects slightly lower despite surge in Alberta

The balance of opinion for employment prospects for the next three months decreased 2 points to -2 in October. While 85% of manufacturers stated that they would keep or add to their work force, 15% indicated that they expected to decrease employment in the fourth quarter. Regionally, manufacturers expected slightly lower employment levels in Ontario (balance -5) and Quebec (balance -9), which more than offset a red hot market in Alberta (balance +22), where many manufacturers expressed difficulty in finding skilled labour. According to the September Labour Force Survey, employment in the manufacturing sector stood at almost 2.18 million, down 0.4% from the August level. Compared to 12 months ago, there were 114,000 (-5.0%) fewer people working in manufacturing in September.

Manufacturers reported more production impediments

The number of manufacturers reporting no production impediments decreased 5 points to 74% in October. The proportion reporting a shortage of skilled labour was up 1 point from July to 9%, a level unseen since the fourth quarter of 2000. What is really fuelling the number is a shortage of skilled labour in Alberta. Some 42% of manufacturers in Alberta indicated they were facing skilled labour shortages, up from 25% in July. Producers reporting "other production impediments" increased 2 points to 5% in October. Comments in this category related to impediments caused by the high value of the Canadian dollar and increases in the cost of raw material caused by the hurricanes along the US Gulf Coast.

Available on CANSIM: tables 302-0007 and 302-0008.

Definitions, data sources and methods: survey number 2152.

Business Conditions Survey data for January 2006 will be released on January 27.

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 Claude Robillard (613-951-3507; (*claude.robillard@statcan.ca*), Manufacturing, Construction and Energy Division.

□

Business Conditions Survey: Manufacturing industries

	October 2004	January 2005	April 2005	July 2005	October 2005
	seasonally adjusted				
Volume of production during next three months compared with last three months will be:					
About the same (%)	69	73	64	60	68
Higher (%)	21	13	18	19	17
Lower (%)	10	13	18	21	15
Balance of opinion	11	0	0	-2	2
Orders received are:					
About the same (%)	77	69	60	65	76
Rising (%)	18	15	17	13	14
Declining (%)	5	16	23	22	10
Balance of opinion	13	-1	-6	-9	4
Present backlog of unfilled orders is:					
About normal (%)	65	63	52	58	60
Higher than Normal (%)	17	11	12	18	20
Lower than Normal (%)	18	26	35	23	20
Balance of opinion	-1	-15	-23	-5	0
Finished product inventory on hand is:					
About right (%)	78	74	66	72	67
Too low (%)	5	6	5	2	7
Too high[1](%)	17	20	29	26	26
Balance of opinion	-12	-14	-24	-24	-19
Employment during the next three months will:					
Change little (%)	73	71	65	71	72
Increase (%)	17	13	19	14	13
Decrease (%)	10	15	16	14	15
Balance of opinion	7	-2	3	0	-2
	unadjusted %				
Sources of production difficulties:					
Working capital shortage	2	2	3	2	3
Skilled labour shortage	7	5	7	8	9
Unskilled labour shortage	3	1	2	3	4
Raw material shortage	5	4	5	4	5
Other difficulties	3	2	12	3	5
No difficulties	80	86	71	79	74

1 . No evident seasonality.

Business Conditions Survey: Manufacturing industries — Production prospects balance of opinion for select industries

	October 2004	January 2005	April 2005	July 2005	October 2005
Major group industries	seasonally adjusted				
Non-durable goods	**8**	**4**	**1**	**2**	**1**
Food	21	5	2	7	-3
Chemical	9	6	-1	2	12
Petroleum and coal products	-2	21	-7	-10	36
Paper	7	6	6	-5	-6
Plastic and rubber products	19	10	4	8	7
Durable goods	**14**	**-2**	**-3**	**-8**	**6**
Transportation equipment	6	0	-8	-8	-1
Primary metal	4	-12	9	-9	7
Wood products	8	-2	-8	3	-9
Fabricated metal products	10	14	5	20	29
Machinery	17	13	12	15	10
Computer and electronic products	32	5	23	-1	11

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Payroll employment, earnings and hours

August 2005 (preliminary)

The average weekly earnings of payroll employees increased by $4.62 from July to August (seasonally adjusted) to $735.91. The increase brings the year-to-date annual growth for 2005 to 2.6%. This rate of change is obtained by comparing the average of the first eight months of 2005 with the average of the same period of 2004.

Industries showing the strongest year-to-date increases through August included: mining (+5.1%), accommodation and food services (+4.4%), retail trade (+3.9%), and construction (+3.8%).

Payroll employment in August declined slightly from the previous month (-6,400), with small employment losses in most provinces. However, employment is up 241,800 since August 2004.

Since August 2004, job gains have been strongest in Ontario (+103,300), Alberta (+54,500) and British Columbia (+30,000). On the other hand, payroll employment fell in Newfoundland (-10,900), New Brunswick (-1,800) and Manitoba (-900) during the same time period.

Available on CANSIM: tables 281-0023 to 281-0046.

Definitions, data sources and methods: survey number 2612.

Detailed industry data, data by size of enterprise based on employment, and other labour market indicators will be available soon in the monthly publication *Employment, Earnings and Hours* (72-002-XIB, $26/$257).

Data on payroll employment, earnings and hours for September will be released on November 29.

For general information or to order data, contact Client Services (1-866-873-8788; 613-951-4090; fax: 613-951-2869; *labour@statcan.ca*). To enquire about the concepts, methods or data quality of this release, contact Robert Frindt (613-951-4069), Labour Statistics Division. □

Average weekly earnings for all employees

Industry group (North American Industry Classification System)	August 2004	July 2005[r]	August 2005[p]	July to August 2005	August 2004 to August 2005
	seasonally adjusted				
	$			% change	
Industrial aggregate	**706.05**	**731.29**	**735.91**	**0.6**	**4.2**
Forestry, logging and support	867.31	912.35	911.45	-0.1	5.1
Mining and oil and gas	1,252.72	1,306.95	1,312.76	0.4	4.8
Utilities	1,058.86	1,061.69	1,060.74	-0.1	0.2
Construction	839.57	882.61	891.59	1.0	6.2
Manufacturing	858.84	886.58	894.08	0.8	4.1
Wholesale trade	800.53	833.27	842.75	1.1	5.3
Retail trade	455.70	474.93	475.84	0.2	4.4
Transportation and warehousing	761.43	777.02	783.08	0.8	2.8
Information and cultural industries	828.60	879.07	888.68	1.1	7.3
Finance and insurance	902.60	956.44	958.16	0.2	6.2
Real estate and rental and leasing	614.59	650.36	637.25	-2.0	3.7
Professional, scientific and technical services	917.53	961.57	959.71	-0.2	4.6
Management of companies and enterprises	843.62	932.44	917.09	-1.6	8.7
Administrative and support, waste management and remediation services	560.32	587.48	588.75	0.2	5.1
Educational services	774.79	807.69	808.41	0.1	4.3
Health care and social assistance	640.44	660.20	664.48	0.6	3.8
Arts, entertainment and recreation	416.62	415.02	410.28	-1.1	-1.5
Accommodation and food services	299.07	310.00	313.64	1.2	4.9
Other services (excluding public administration)	546.07	566.18	570.53	0.8	4.5
Public administration	875.07	898.55	902.96	0.5	3.2
Provinces and territories					
Newfoundland and Labrador	649.83	665.78	662.48	-0.5	1.9
Prince Edward Island	551.33	575.70	575.12	-0.1	4.3
Nova Scotia	611.11	637.09	641.25	0.7	4.9
New Brunswick	635.87	665.32	666.73	0.2	4.9
Quebec	669.73	691.59	691.24	-0.1	3.2
Ontario	746.77	772.26	778.74	0.8	4.3
Manitoba	638.61	662.91	666.57	0.6	4.4
Saskatchewan	650.03	680.79	681.18	0.1	4.8
Alberta	731.35	769.75	776.58	0.9	6.2
British Columbia	694.38	717.22	719.18	0.3	3.6
Yukon	803.63	831.23	829.93	-0.2	3.3
Northwest Territories[1]	925.69	946.42	965.18	2.0	4.3
Nunavut[1]	803.17	880.40	876.20	-0.5	9.1

r *Revised.*
p *Preliminary.*
1. *Data not seasonally adjusted.*

Number of employees

Industry group (North American Industry Classification System)	June 2005	July 2005r	August 2005p	June to July 2005	July to August 2005
	seasonally adjusted				
	'000			% change	
Industrial aggregate	**13,735.1**	**13,724.3**	**13,717.9**	**-0.1**	**0.0**
Forestry, logging and support	49.9	49.5	50.2	-0.8	1.4
Mining and oil and gas	160.6	161.7	163.5	0.7	1.1
Utilities	119.8	120.1	119.4	0.3	-0.6
Construction	683.8	684.5	687.9	0.1	0.5
Manufacturing	1,952.7	1,942.6	1,939.2	-0.5	-0.2
Wholesale trade	738.3	738.7	736.2	0.1	-0.3
Retail trade	1,696.0	1,695.1	1,697.1	-0.1	0.1
Transportation and warehousing	625.8	626.9	624.7	0.2	-0.4
Information and cultural industries	355.8	347.0	345.1	-2.5	-0.5
Finance and insurance	579.9	582.5	582.8	0.4	0.1
Real estate and rental and leasing	243.8	242.1	240.7	-0.7	-0.6
Professional, scientific and technical services	667.7	666.7	665.0	-0.1	-0.3
Management of companies and enterprises	94.4	95.6	95.5	1.3	-0.1
Administrative and support, waste management and remediation services	658.4	664.6	669.5	0.9	0.7
Educational Services	981.0	977.4	981.3	-0.4	0.4
Health care and social assistance	1,405.0	1,408.6	1,405.2	0.3	-0.2
Arts, entertainment and recreation	245.0	245.3	245.4	0.1	0.0
Accommodation and food services	951.7	955.0	954.2	0.3	-0.1
Other services (excluding public administration)	511.3	510.2	507.5	-0.2	-0.5
Public administration	780.7	787.5	785.7	0.9	-0.2
Provinces and territories					
Newfoundland and Labrador	185.3	183.1	178.4	-1.2	-2.6
Prince Edward Island	64.9	65.6	65.7	1.1	0.2
Nova Scotia	388.7	386.6	384.7	-0.5	-0.5
New Brunswick	294.9	295.4	296.9	0.2	0.5
Quebec	3,204.5	3,213.5	3,211.2	0.3	-0.1
Ontario	5,344.3	5,349.4	5,344.0	0.1	-0.1
Manitoba	532.1	530.2	527.9	-0.4	-0.4
Saskatchewan	411.2	409.2	408.7	-0.5	-0.1
Alberta	1,529.2	1,534.6	1,534.6	0.4	0.0
British Columbia	1,716.2	1,704.8	1,701.6	-0.7	-0.2
Yukon	17.0	16.8	17.0	-1.2	1.2
Northwest Territories[1]	23.4	23.3	23.5	-0.4	0.9
Nunavut[1]	11.3	11.0	11.4	-2.7	3.6

r *Revised.*
p *Preliminary.*
1. *Data not seasonally adjusted.*

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Hog inventories
Third quarter 2005

Producers' inventories of hogs slumped during the third quarter of 2005 in the wake of declining exports. Farmers reported 14.9 million hogs on their farms as of October 1, 2005, down from the record set at July 1, 2005, but 1.7% above the same date in 2004.

Hog exports rose rapidly during 2003, spiking to a record 8.5 million animals in 2004, 14.4% higher than exports in 2003 and an impressive 48.3% over 2002. Many of the exported animals were younger hogs for feeding in the United States.

Although exports in 2005 have been at historically high levels, they have declined from last year's peak. During the first nine months of 2005, exports dropped 7.5% compared to the same period in 2004.

Fewer exports have led to higher inventories of market hogs to be fed in Canada. Market hogs climbed 1.8% over the year to reach 13.3 million hogs while the breeding herd rose a more modest 0.9%.

Information (jointly published by Statistics Canada and the United States Department of Agriculture) indicates that the combined Canada-US hog inventories on September 1, 2005, rose marginally over the year to a record 76.4 million animals. The combined total was pushed upwards by the 1.7% increase in Canadian hog inventories as the US hog industry remained stable compared to the previous year.

Prices for hogs weakened in 2005, even though anti-dumping duties were lifted following an April 6, 2005, negative determination by the International Trade Commission. The third quarter prices were 15.8% lower than the same quarter in 2004. Hog prices, which were soft in 2002 and 2003, rebounded briefly in 2004.

Meanwhile, domestic slaughter has declined modestly this year. During the first nine months of 2005, hog slaughter slipped 0.4% compared with same period in 2004.

Weaker prices and lower exports will present challenges to the hog industry although they will continue to benefit from efficient production and low feed costs. In fact, hog farm cash receipts in the first half of 2005 surpassed, albeit marginally, the record set for the same period in 2004.

Available on CANSIM: table 003-0004.

Definitions, data sources and methods: survey number 3460.

The report *Hog Statistics*, Vol. 4, no. 4 (23-010-XIE, free) is now available online. From the *Our products and services* page, under *Browse our Internet publications*, choose *Free*, then *Agriculture*.

For general information, contact client services (1-800-465-1991). To enquire about the concepts, methods or data quality of this release, please contact Robert Plourde (613-951-8716; *robert.plourde@statcan.ca*), Agriculture Division.

Hog inventories
October 1, 2005

	Breeding		Market hogs				Total hogs	
	2005	2004 to 2005	2005	2004 to 2005	2005	2004 to 2005	2005	2004 to 2005
			Under 20 kg		20 kg and over			
	'000 head	% change	'000 head	% change	'000 head	% change	'000 head	% change
Canada	**1,642**	**0.9**	**4,533**	**1.0**	**8,735**	**2.1**	**14,910**	**1.7**
Atlantic	33	-0.9	105	-0.9	201	-6.2	339	-4.1
Quebec	417	0.0	1,298	0.8	2,641	1.5	4,355	1.2
Ontario	443	1.4	1,151	7.9	2,127	0.0	3,720	2.5
East	**893**	**0.7**	**2,553**	**3.8**	**4,969**	**0.5**	**8,414**	**1.5**
Manitoba	372	0.4	921	-7.7	1,617	8.5	2,910	1.8
Saskatchewan	133	1.1	415	3.0	831	3.8	1,379	3.3
Alberta	223	3.2	599	3.5	1,219	0.2	2,040	1.5
British Columbia	21	-2.7	46	-4.2	100	-2.7	167	-3.1
West	**750**	**1.2**	**1,980**	**-2.3**	**3,767**	**4.3**	**6,496**	**1.9**

Note: *Figures may not add up to totals due to rounding.*

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Monthly Restaurants, Caterers and Taverns Survey

August 2005 (preliminary)

Total sales of the restaurants, caterers and taverns industry reached $3.4 billion in August, a 2.0% increase over August 2004. (Data are neither seasonally adjusted, nor adjusted for inflation).

The largest year-over-year increases, at the provincial level, were recorded in Alberta (+12.1%), Quebec (+5.0%) and British Columbia (+3.1%).

The year-over-year increase in sales, at the national level, was due to higher sales at limited service restaurants (+6.9%). This sector accounted for 40% of the industry sales in August.

Available on CANSIM: table 355-0001.

Definitions, data sources and methods: survey number 2419.

For more information, to enquire about the concepts, methods or data quality, or to obtain the new methodology paper about the Monthly Restaurants, Caterers and Taverns Survey contact Alain Mbassegue (613-951-2011; fax: 613-951-6696, *alain.mbassegue@statcan.ca*), Service Industries Division, Statistics Canada. □

Food services sales

	August 2004[r]	July 2005[r]	August 2005[p]	August 2004 to August 2005
	Not seasonally adjusted			
	$ thousands			% change
Total, food services sales	**3,377,896**	**3,472,440**	**3,446,345**	**2.0**
Full service restaurants	1,665,861	1,650,984	1,641,222	- 1.5
Limited service restaurants	1,284,116	1,373,317	1,372,027	6.9
Food service contractors	142,525	147,662	146,336	2.7
Social and mobile caterers	66,271	67,467	67,568	2.0
Drinking places	219,122	233,010	219,192	0.0
Provinces and territories				
Newfoundland and Labrador	41,544	44,056	42,130	1.4
Prince Edward Island	21,018	16,636	16,628	- 20.9
Nova Scotia	100,813	89,624	86,200	- 14.5
New Brunswick	70,460	67,531	62,925	- 10.7
Quebec	688,443	761,779	722,749	5.0
Ontario	1,361,209	1,331,923	1,359,682	- 0.1
Manitoba	88,272	88,247	87,418	- 1.0
Saskatchewan	82,243	79,792	83,710	1.8
Alberta	363,840	410,672	407,840	12.1
British Columbia	549,338	570,635	566,376	3.1
Yukon	3,407	3,635	3,193	- 6.3
Northwest Territories	6,505	7,078	7,046	8.3
Nunavut	805	833	448	- 44.3

r *Revised.*
p *Preliminary.*

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Stocks of frozen and chilled meats
October 2005

Total frozen and chilled red meat in cold storage at the opening of the first business day of October amounted to 85 088 metric tonnes, down 5% from 89 168 tonnes in September and up 12% from 76 188 tonnes in October 2004. Stocks of frozen poultry meat in cold storage on October 1 totalled 64 185 metric tonnes, up 2% from a year ago.

Available on CANSIM: tables 003-0005 and 003-0041.

Definitions, data sources and methods: survey number 3423.

The October issue of *Stocks of Frozen and Chilled Meats* (23-009-XIE, free) is now available online. From the *Our products and services* page, choose *Free Publications*, then *Agriculture*.

For general information, call (1-800-465-1991). To enquire about the concepts, methods and data quality of this release, contact Barbara McLaughlin (902-893-7251; *barbara.mclaughlin@statcan.ca*), Agriculture Division. ■

Sawmills and planing mills
August 2005

Data on sawmills and planing mills are now available for August.

Available on CANSIM: table 303-0009.

Definitions, data sources and methods: survey numbers, including related surveys, 2134 and 2135.

The August issue of *Sawmills and Planing Mills*, Vol. 59, no. 8 (35-003-XIB, $10/$93) 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

Statistics Canada International Symposium Series: Proceedings: Innovative Methods for Surveying Difficult-to-reach Populations, 2004
Catalogue number 11-522-XCB ($32).

Statistics Canada International Symposium Series: Proceedings: Innovative Methods for Surveying Difficult-to-reach Populations, 2004
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Stocks of Frozen and Chilled Meats, October 2005
Catalogue number 23-009-XIE
(free).

Hog Statistics, 2005, Vol. 4, no. 4
Catalogue number 23-010-XIE
(free).

Sawmills and Planing Mills, August 2005, Vol. 59, no. 8
Catalogue number 35-003-XIB ($10/$93).

Steel, Tubular Products and Steel Wire, August 2005, Vol. 1, no. 8
Catalogue number 41-019-XIE ($6/$51).

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

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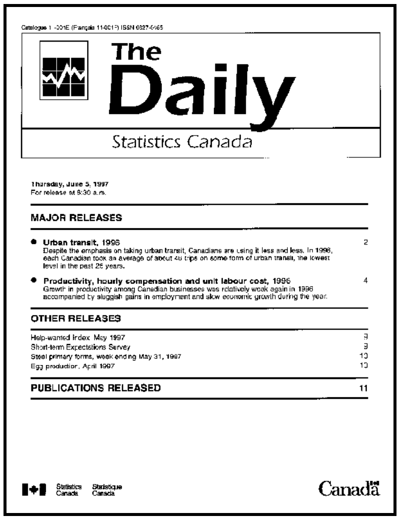

Catalogue 11-001E (Français 11-001F) ISSN 0827-0465

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.

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