



# The Daily

Statistics Canada

**Monday, October 16, 2006**

Released at 8:30 a.m. Eastern time

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## Releases

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### Monthly Survey of Manufacturing, August 2006

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Shipments from Canadian factories in August declined slightly from their highest level of 2006. With commodity prices falling, manufacturers shipped goods worth \$49.8 billion, down 0.3% from July.

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Steel primary forms, weekly data, week ending October 7, 2006

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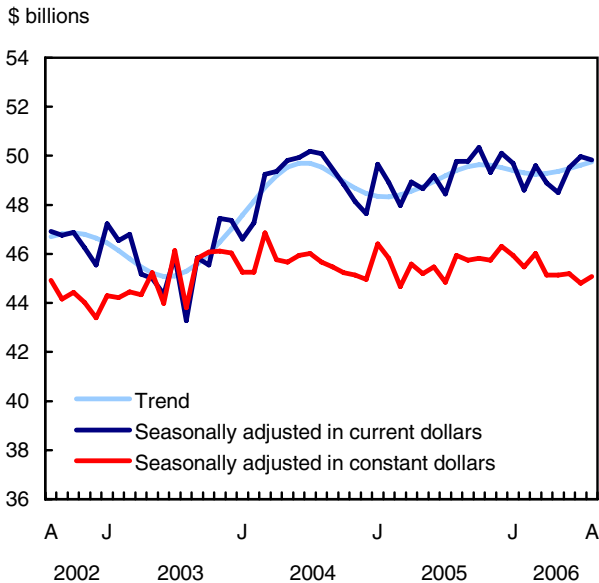
## Releases

### Monthly Survey of Manufacturing

August 2006

Shipments from Canadian factories in August declined slightly from their highest level in 2006. With commodity prices falling the volume of goods shipped actually increased in August.

#### Shipments down, volumes up



Canadian manufacturers shipped goods worth \$49.8 billion, down 0.3% from July. However, if price declines were taken into account, the overall volume of shipments actually increased 0.5% to \$45.0 billion.

Constant dollar shipments (taking price fluctuations into account) in August 2006 were 2.3% lower than they were in August last year, and declined 0.4% when comparing the first eight months of 2006 to the same period in 2005.

Shipments decreased in 12 of 21 manufacturing industries in August. Durable goods shipments fell by 1.0% to \$26.4 billion, with the transportation sector declining for a second month. Non-durable goods increased by 0.6% to \$23.4 billion, thanks to increases in paper, chemicals and food manufacturing. These increases were tempered some by lower shipments from the petroleum industry.

#### 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 plastics and rubber products.

**Durable goods industries** include wood products, non-metallic mineral products, primary metals, fabricated metal products, machinery, computer and electronic products, electrical equipment, appliances and components, transportation equipment, furniture and related products and miscellaneous manufacturing.

**Unfilled orders** are a stock of orders that will contribute to future shipments assuming that the orders are not cancelled.

**New orders** are those received whether shipped in the current month or not. They are measured as the sum of shipments for the current month plus the change in unfilled orders. Some people interpret new orders as orders that will lead to future demand. This is inappropriate since the "new orders" variable includes orders that have already been shipped. Readers should note that the month-to-month change in new orders may be volatile. This will happen particularly if the previous month's change in unfilled orders is closely related to the current month's change.

Not all orders will be translated into Canadian factory shipments because portions of large contracts can be subcontracted out to manufacturers in other countries. Also, some orders may be cancelled.

#### Shipments fall on lower transportation output and petroleum prices

Shipments of transportation equipment fell 1.5% to \$9.2 billion. This was the second month of decline as the automotive post-shutdown season started more slowly than usual. Automotive manufacturing shipments fell 1.5% to \$4.9 billion as a result of slower vehicle sales. Auto parts shipments were down 1.2% to \$2.3 billion.

Falling prices for petroleum and coal products resulted in a decline in shipment value of 2.0% to \$5.6 billion, dropping the industry to number three, behind the food industry.

Food manufacturing increased 1.2% to \$5.7 billion, making it the second largest industrial sector after transportation, thanks in part to increased production of seafood on the East Coast and beef on the prairies.

Chemicals increased 1.8% to \$4.5 billion — the second highest level on record and the highest in 10 months. Shipments of paper products jumped 4.4% to \$2.7 billion, the highest level in 2006.

### Shipments up in six provinces

Shipments by province showed no strong regional trends with Ontario posting only marginal gains while Quebec shipment levels declined slightly.

In the Atlantic provinces, Newfoundland and Labrador and Prince Edward Island experienced strong increases in shipments, especially in the food industry, while Nova Scotia's shipments increased only slightly. New Brunswick's sharp decline was influenced by lower petroleum prices.

The picture in the West was also varied. Manitoba and Saskatchewan experienced declines while Alberta saw a marginal increase in shipments. British Columbia, on the other hand, saw strong growth on paper products.

Shipments from Quebec declined 1.6% to \$11.8 billion, with the largest decrease coming from the primary metals industry followed by petroleum, which fell by 3.0% due to lower prices and volume.

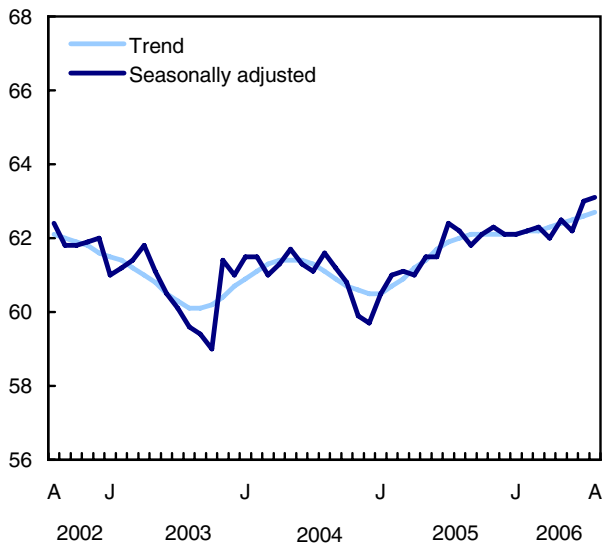
value of shipments in the primary metals industry and also a \$7.5 million decline in the value of food shipments. Transportation equipment manufacturing rose by 8.2%, offsetting some of the decline.

Chemical manufacturing posted the strongest gains in Alberta, contributing to a 0.2% increase to \$5.7 billion. In spite of weakening oil prices, shipments of petroleum and coal products were the second strongest in Alberta after chemicals.

Shipments from British Columbia increased 4.8% to \$3.6 billion largely due to a 17.8% increase in paper shipments to just over a half billion dollars and primary metals, which increased by nearly one-fifth to just under \$300 million. Wood product shipments decreased 1.4% to \$722 million. Factors such as the protracted softwood lumber dispute, the high exchange rate, the high price of fuel and the decline in housing starts in the United States have meant a 15.8% drop in year-to-date shipments when compared to 2005.

### Chemicals and wood inventories rise

\$ billions



The transportation industry, which accounts for nearly a third of all of Ontario's manufacturing output, decreased 2.0% to \$7.6 billion. Automotive manufacturing posted a 1.5% decline to \$4.8 billion. Decreases in the transportation and machinery industries largely offset gains in the petroleum (+6.0%), fabricated metals (+4.2%) and primary metals (+3.3%) industries between July and August.

Manitoba's 4.2% decrease in shipments to \$1.2 billion was largely due to a decline in the

### Manufacturing shipments, provinces and territories

	July 2006 <sup>r</sup>	August 2006 <sup>p</sup>	July to August 2006
	Seasonally adjusted		
	\$ millions		% change
<b>Canada</b>	<b>49,973</b>	<b>49,842</b>	<b>-0.3</b>
Newfoundland and Labrador	160	181	13.0
Prince Edward Island	111	116	4.1
Nova Scotia	784	788	0.5
New Brunswick	1,422	1,286	-9.6
Quebec	12,014	11,823	-1.6
Ontario	24,233	24,300	0.3
Manitoba	1,300	1,245	-4.2
Saskatchewan	895	873	-2.5
Alberta	5,644	5,656	0.2
British Columbia	3,402	3,567	4.8
Yukon	2	2	5.7
Northwest Territories including Nunavut	7	6	-15.6

<sup>r</sup> revised

<sup>p</sup> preliminary

### Inventories increase in chemicals and wood products

Manufacturers' total inventories increased by \$107 million dollars (+0.2%) to \$63.1 billion in August, following a 1.3% rise in July — mainly because of a 2.0% increase in chemical inventories to \$7.2 billion and a 1.4% increase to \$4.7 billion in wood products.

Transportation inventories declined 1.5% to \$8.6 billion, largely as a result of an 8.7% decline in motor vehicle manufacturing and a 1.9% decrease in aerospace products. Inventories of primary metals declined 1.0% to \$6.6 billion. Inventory in raw materials and finished products increased while goods in process inventories declined in August.

### Transportation leads decline in new orders

New orders declined by 1.1% to \$49.5 billion in August.

After quadrupling between April and June of 2006, new orders fell significantly in the aerospace industry for the second straight month, declining by 11.4% to \$1.2 billion. In the motor vehicle industry, new orders fell by over a quarter of a billion dollars to \$4.7 billion. In total, new orders in the transportation industry declined by \$312 million to \$9.1 billion. Primary metals experienced the second largest decline (-3.1%) to \$4.3 billion while machinery declined by 2.9% to \$2.6 billion.

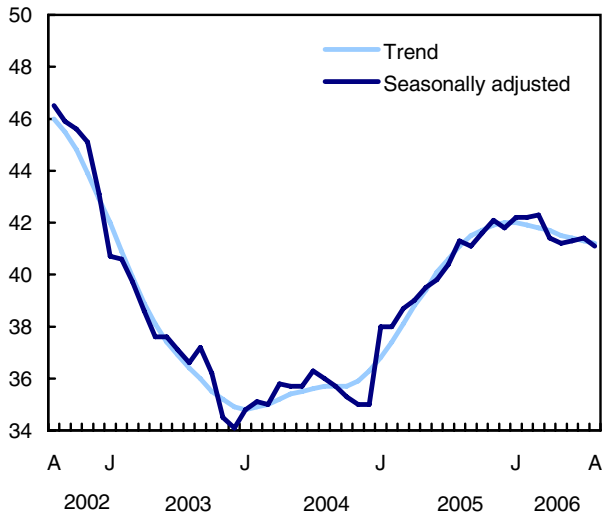
### Transportation and primary metals behind drop in unfilled orders

Unfilled orders declined 0.8% to \$41.1 billion following two months of small increases (+0.2% for July and +0.4% for June). The transportation industry experienced the largest decrease, falling 0.7% to \$20.4 billion. While the aerospace industry rose slightly unfilled orders for motor vehicles drove most of the decline, slipping 15.4% to \$1.3 billion.

The primary metals industry was another major contributor to the decline in unfilled orders, falling 4.9% to \$2.0 billion in August.

### Transportation and metals decline drives unfilled order drop

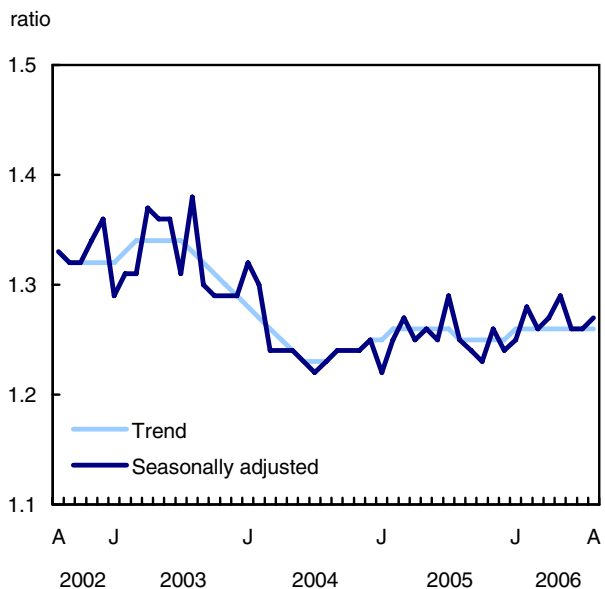
\$ billions



### Inventory-to-shipment ratio steady

The inventory-to-shipment ratio increased to 1.27 in August and the finished-product inventory-to-shipment ratio increased to 0.44 from 0.43, while the trend remained stable. The inventory-to-shipment ratio is a key measure of the time, in months, that would be required to exhaust inventories if shipments were to remain at their current level.

### Inventory-to-shipment ratio trend stable



### Manufacturing employment continues to recede

According to the Labour Force Survey for the month of August, goods-producing industries have continued to be affected by waning foreign demand. Manufacturing employment declined by 11,300 in August, bringing losses to 87,000 since the beginning of 2006.

Manufacturing has been shedding workers since 2002, with August marking the lowest level of employment for this industry since March 1998. Since the start of 2006, manufacturing declines have been widespread, with the largest decreases in food and motor vehicle and parts manufacturing.

Available on CANSIM: tables 304-0014, 304-0015 and 377-0008.

Definitions, data sources and methods: survey number 2101.

All data are benchmarked to the 2004 Annual Survey of Manufactures.

Data from the September Monthly Survey of Manufacturing will be released on November 15.

For general information or to order data, contact the dissemination officer (toll-free 1-866-873-8789; 613-951-9497; fax: 613-951-9499; [manufact@statcan.ca](mailto:manufact@statcan.ca)). To enquire about the concepts, methods or data quality of the release, contact Daryl Keen (613-951-1810; [keendar@statcan.ca](mailto:keendar@statcan.ca)), Manufacturing, Construction and Energy Division.

### Shipments, inventories and orders in all manufacturing industries

	Shipments		Inventories		Unfilled orders		New orders		Inventories-to-shipment ratio		
	Seasonally adjusted										
	\$ millions	% change	\$ millions	% change	\$ millions	% change	\$ millions	% change			
August 2005	49,778	2.8	62,170	-0.4	41,260	2.1	50,637	3.3	1.25		
September 2005	49,767	-0.0	61,840	-0.5	41,113	-0.4	49,620	-2.0	1.24		
October 2005	50,350	1.2	62,118	0.4	41,646	1.3	50,883	2.5	1.23		
November 2005	49,319	-2.0	62,289	0.3	42,083	1.0	49,755	-2.2	1.26		
December 2005	50,098	1.6	62,051	-0.4	41,753	-0.8	49,769	0.0	1.24		
January 2006	49,668	-0.9	62,066	0.0	42,179	1.0	50,094	0.7	1.25		
February 2006	48,479	-2.4	62,216	0.2	42,183	0.0	48,483	-3.2	1.28		
March 2006	49,469	2.0	62,292	0.1	42,308	0.3	49,594	2.3	1.26		
April 2006	48,827	-1.3	62,003	-0.5	41,386	-2.2	47,905	-3.4	1.27		
May 2006	48,505	-0.7	62,495	0.8	41,154	-0.6	48,273	0.8	1.29		
June 2006	49,512	2.1	62,192	-0.5	41,326	0.4	49,683	2.9	1.26		
July 2006	49,973	0.9	62,993	1.3	41,425	0.2	50,073	0.8	1.26		
August 2006	49,842	-0.3	63,100	0.2	41,086	-0.8	49,503	-1.1	1.27		

### Manufacturing industries except motor vehicle, parts and accessories

	Shipments		Inventories		Unfilled orders		New orders	
	Seasonally adjusted							
	\$ millions	% change	\$ millions	% change	\$ millions	% change	\$ millions	% change
August 2005	41,363	1.7	59,080	-0.3	39,073	2.3	42,232	2.8
September 2005	41,841	1.2	58,704	-0.6	38,956	-0.3	41,724	-1.2
October 2005	41,980	0.3	59,113	0.7	39,530	1.5	42,555	2.0
November 2005	41,351	-1.5	59,298	0.3	39,906	1.0	41,728	-1.9
December 2005	42,067	1.7	59,060	-0.4	39,447	-1.2	41,607	-0.3
January 2006	42,034	-0.1	59,053	-0.0	39,771	0.8	42,358	1.8
February 2006	40,787	-3.0	59,329	0.5	39,652	-0.3	40,669	-4.0
March 2006	42,086	3.2	59,496	0.3	39,552	-0.3	41,985	3.2
April 2006	41,432	-1.6	59,275	-0.4	38,668	-2.2	40,548	-3.4
May 2006	41,330	-0.2	59,782	0.9	38,422	-0.6	41,084	1.3
June 2006	42,165	2.0	59,545	-0.4	38,745	0.8	42,488	3.4
July 2006	42,606	1.0	60,092	0.9	38,915	0.4	42,777	0.7
August 2006	42,579	-0.1	60,325	0.4	38,840	-0.2	42,503	-0.6

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## Study: Canada's grape and wine industry 2005

Canadian wine products have become increasingly popular over the past decade, largely because of a transformation that began during the late 1980s and early 1990s.

During this time, growers switched from producing wines made from native species (*Labrusca*) grapes to those made from wine quality grapes (vinifera and French hybrid varieties).

As the grape industry was switching to wine quality grapes, the Canadian wine industry, although relatively small, was growing at a remarkable pace, according to a new study "From the vine to the glass: Canada's grape and wine industry," published today in the *Analysis in Brief* series.

In fact, the industry had the 11th highest growth rate among the 215 industry groups between 1997 and 2005. During this period, its real gross domestic product increased at an average annual rate of 7.1%, more than double the rate of growth of 3.0% for the nation as a whole.

The industry is, however, relatively small, accounting for only 0.03% of the economy-wide gross domestic product in 2005. It employed close to 2,500 persons in 2004, which represented only 0.14% of all manufacturing jobs.

The study examines the transformation in the Canadian grape and wine industries, and the evolution of wine sales in Canada from 1993 to 2005.

Canadians' taste for their own wines spurred the sales growth in this industry, as almost all of the increase has been the result of domestic sales.

Between 1992/1993 and 2004/2005, total sales of Canadian wines (including cider, sparkling and coolers) increased by \$557.4 million. Of this amount, \$517.2 million or 93% came from the Canadian retail market.

Exports also increased, but remained at relatively low levels compared with domestic sales. The most important export markets for Canadian wines are the United States and Taiwan.

In total, the value of wine sales in Canada exceeded \$4.2 billion in the fiscal year ending March 31, 2005. Consumers bought a record high volume of 360 million litres of wine, of which 40% were Canadian brands and 60% imported.

Canadians are still very much a beer-drinking nation. But more and more, wines are making inroads.

For the first time, the value of sales of wine has surpassed that of spirits in Canada. In the fiscal year ending March 31, 2005, wine accounted for 25.2% of

the value of sales of alcoholic beverages, compared with 24.3% for spirits, the first time wine has jumped into second place. Beer accounted for 50.4%.

Quebec residents bought the highest amount of wine, averaging 18.2 litres per adult in 2005. They were followed by consumers in British Columbia who bought 16.2 litres on average.

However, the biggest increase occurred in Nova Scotia, where sales doubled during this period from a low of 6.4 litres in 1993 to a high of 13.6 litres in 2005.

### Definitions, data sources and methods: survey number 1726.

The analytical article "From the vine to the glass: Canada's grape and wine industry (11-621-MIE2006049, free) is now available online in the *Analysis in Brief* series from the *Publications* module of our website.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Christian Houle (613-951-0377), Business and Trade Statistics Field. ■

## Quarterly Retail Commodity Survey

Second quarter 2006

Rising fuel prices continued to drive consumers to spend more of their retail dollar on automotive fuels, oils and additives in the second quarter of 2006.

Consumers spent \$10.1 billion on automotive fuels, oils and additives in retail stores in the second quarter of 2006, an increase of 22.4% over the same quarter last year. This was due in part to a 16.6% rise in the price of gasoline over the same period.

Automotive fuels, oils and additives accounted for 10 cents of every retail dollar in the second quarter of 2006. This was the sixth consecutive quarter that automotive fuels, oils and additives accounted for at least 9 cents of every dollar spent in retail stores. In comparison, in 2004, this commodity represented just over 8 cents of every retail dollar.

In total, consumers spent \$103.2 billion on goods and services in retail stores in the second quarter of 2006, up 7.2% over the second quarter of 2005. Excluding automotive fuels, oils and additives, the rest of retail sales increased at a slightly lower rate of 5.8% in the second quarter of 2006.

Sales of health and personal care products showed the second strongest growth (+9.2%) of the major commodity groupings over the same quarter last year. This was the highest growth since the first quarter of 2004. Drugs (prescription and

over-the-counter drugs, vitamins and other health supplements) accounted for two-thirds of the sales of this commodity grouping. In the second quarter of 2006, year-over-year sales of prescription drugs advanced 11.1% to \$4.5 billion, a faster pace than the approximately 8% increase observed in the previous three quarters. Over-the-counter drugs, vitamins and other health supplements registered sales of \$984.9 million, up 7.7% from the second quarter of 2005.

In the second quarter of 2006, the market share of pharmacies and personal care stores for over-the-counter drugs, vitamins and other health supplements was 64%, up 5 percentage points from the second quarter of 2005. Their market share for prescription drugs remained stable at 82% over the same period.

At \$8.8 billion, sales of hardware, lawn and garden products continued to benefit from a strong housing and home renovation market, rising 8.9% over the second quarter of 2005. This increase was due in part to the strength in sales of hardware and home renovation products which rose 9.1%, driven by a 12.5% increase in sales of lumber. Sales of lawn and garden products, equipment and plants also contributed to the overall growth, increasing 8.4% from the same quarter last year to \$2.7 billion.

In the second quarter of 2006, sales of new motor vehicles, parts and services totalled \$23.8 billion, 2.3% more than the same quarter last year. This was the lowest year-over-year increase since the third quarter of 2004. The value of new vehicle sales rose by 1.1% on the strength of new car sales (+4.2%), which was partially offset by a decline of 1.7% in sales of new trucks (which include minivans, sport-utility vehicles, light and heavy trucks, vans and buses). This was the first decline in sales of new trucks since the fourth quarter of 2003. Used vehicle sales gained 2.2%, the largest increase since the third quarter of 2005. Sales of automotive parts and services (including tires), which account for one-fifth of sales in this group, advanced 6.3%.

Consumers spent 5.4% more on food and beverages in retail stores in the second quarter of 2006 compared to the same quarter last year. Since the beginning of 2006, food and beverage stores have accounted for 86% of retail sales of food and beverages, down one percentage point from the first six months of 2005. The market share of general merchandise stores (which include department stores) for food and beverage products increased by one percentage point over the same period.

**Note:** The Quarterly Retail Commodity Survey collects national level retail sales by commodity, from a sub-sample of businesses in the Monthly Retail Trade Survey. Quarterly data have not been adjusted for seasonality. For example, no adjustment has been made for Easter, which occurred in the second quarter of 2006 but took place in the first quarter in 2005. All percentage changes are year-over-year.

**Sales by commodity, all retail stores**

	Second quarter 2005 <sup>r</sup>	First quarter 2006 <sup>r</sup>	Second quarter 2006 <sup>p</sup>	Second quarter 2005 to second quarter 2006
Unadjusted				
	\$ millions		% change	
<b>Commodity</b>				
Food and beverages	20,134	18,827	21,214	5.4
Health and personal care products	7,577	7,715	8,271	9.2
Clothing, footwear and accessories	7,485	5,923	7,990	6.8
Furniture, home furnishings and electronics	7,525	7,632	8,087	7.5
Motor vehicles, parts and services	23,223	18,151	23,759	2.3
Automotive fuels, oils and additives	8,292	8,308	10,148	22.4
Housewares	1,772	1,709	1,874	5.8
Hardware, lawn and garden products	8,063	4,574	8,778	8.9
Sporting and leisure goods	2,931	2,608	3,098	5.7
All other goods and services	9,260	7,247	9,997	8.0
<b>Total</b>	<b>96,262</b>	<b>82,693</b>	<b>103,217</b>	<b>7.2</b>

<sup>r</sup> revised  
<sup>p</sup> preliminary

**Available on CANSIM: table 080-0018.**

**Definitions, data sources and methods: survey number 2008.**

For general information or to order data, contact Client Services (toll-free 1-877-421-3067; 613-951-3549; [retailinfo@statcan.ca](mailto:retailinfo@statcan.ca)). To enquire about the concepts, methods or data quality of this release, contact Ruth Barnes (613-951-6190), Distributive Trades Division. ■

**Steel primary forms, weekly data**

Week ending October 7, 2006 (preliminary)

Steel primary forms production for the week ending October 7 totalled 313 674 metric tonnes, up 1.4% from 309 238 tonnes a week earlier and up 6.2% from 295 462 tonnes in the same week of 2005.

The year-to-date total as of October 7 was 12 147 226 tonnes, up 2.3% from 11 876 441 tonnes in the same period of 2005.

**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 (toll-free 1-866-873-8789; 613-951-9497; [manufact@statcan.ca](mailto:manufact@statcan.ca)), Manufacturing, Construction and Energy Division. ■



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## New products

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**Analysis in Brief: "From the vine to the glass: Canada's grape and wine industry"**, no. 49  
**Catalogue number 11-621-MIE2006049**  
(free).

**Air Passenger Origin and Destination, Canada-United States Report, 2003**  
**Catalogue number 51-205-XIB**  
(free).

**Inter-corporate Ownership, July to September 2006**  
**Catalogue number 61-517-XCB** (\$375/\$1,065).

**Industry Price Indexes, August 2006, Vol. 32, no. 8**  
**Catalogue number 62-011-XIE**  
(free).

**New Motor Vehicle Sales, August 2006, Vol. 78, no. 8**  
**Catalogue number 63-007-XIE**  
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Statistics Canada

Thursday, June 3, 1997  
For release at 8:30 a.m.



**MAJOR RELEASES**

- **Urban transit, 1995** 2  
Despite the emphasis on taking urban transit, Canadians are using it less and less. In 1995, each Canadian took an average of about 20 trips on some form of urban transit, the lowest level in the past 25 years.
- **Productivity, hourly compensation and unit labour cost, 1995** 4  
Growth in productivity among Canadian businesses was notably weak again in 1995, accompanied by sluggish gains in employment and slow economic growth during the year.

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- **Egg production, April 1997** 12

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