



IN·F·O·M·A·T

A WEEKLY REVIEW

Friday, March 22, 1991

OVERVIEW

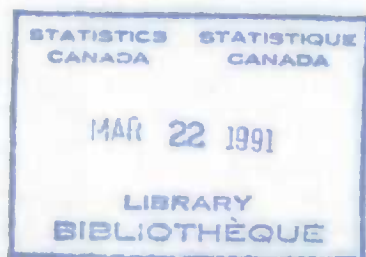
■ Imports Rise While Exports Fall

In January, imports rose by 5.0% to \$11.5 billion after registering little change in the previous month. The value of exports fell by 2.9% to \$11.6 billion, its lowest level in one year.

■ Manufacturing Shipments: Lowest Level in Three Years

In January, Canadian manufacturers' shipments fell 1.5% to \$23.4 billion, the lowest level in three years.

This issue also includes information on **seeding intentions for major crops in 1991**, indicators of science and technology and culture.



Imports Rise While Exports Fall

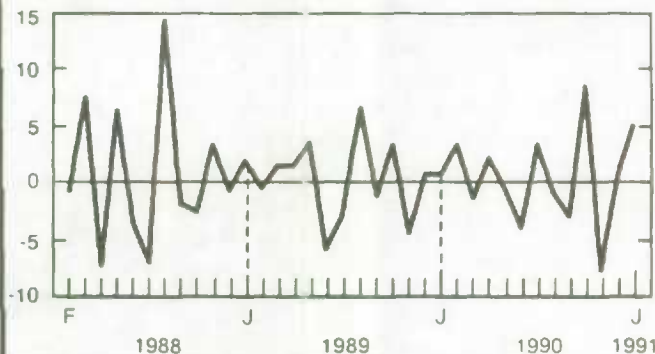
In January, imports rose by 5.0% to \$11.5 billion after registering little change in the previous month. The introduction of the Goods and Services Tax (GST) and the elimination of the Federal Sales Tax (FST) appears to have had a strong effect on imports. The net effect of these changes was to lower prices, and consequently boost imports for automotive products (+30.1%) and machinery and equipment (+11.5%). On the other hand, imports of consumer goods were relatively flat, which is consistent with higher prices resulting from the application of the GST and with a recessionary situation.

The value of merchandise exports fell by 2.9% to \$11.6 billion, their lowest level in one year. Exports of automotive products continued to

(continued on page 2)

Imports

% change, previous month



Statistics
Canada

Statistique
Canada

Canada

... Imports Rise While Exports Fall

decline as exports of cars, trucks and parts fell by 9.8%, accounting for over two-thirds of the total decline in exports. Exports of energy products also decreased (- 5.3%), mainly due to lower prices of crude oil.

For further information, order *Preliminary Statement of Canadian International Trade* (catalogue number 65-001P) or contact International Trade Division at (613) 951-1711.

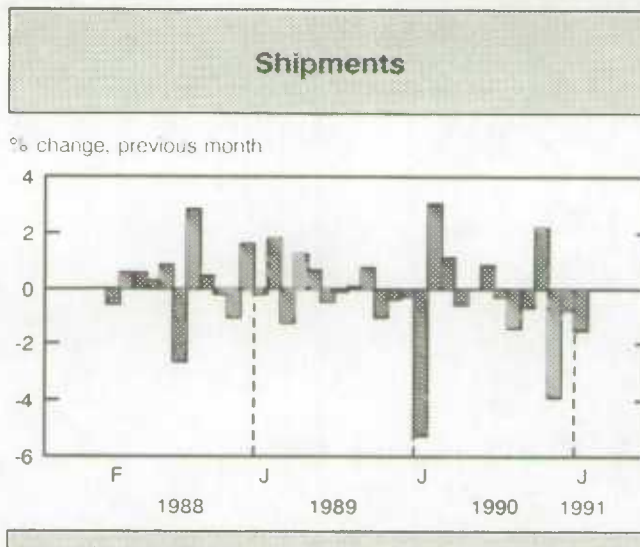
Manufacturing Shipments: Lowest Level in Three Years

In January, Canadian manufacturers' shipments fell 1.5% to \$23.4 billion, the lowest level in three years. This represented a cumulative decline of 8.7% from their peak in September 1989. The January decline was widespread: shipments fell in 19 of the 22 industry groups. Decreases in electrical and electronic products (-9.2%), fabricated metals (-5.2%), and wood (-8.0%) industries were partly offset by an increase in the paper and allied products industry.

Inventories fell 1.4% to \$36.8 billion, after registering little change in the previous three months. A major decrease in refined petroleum products and a decline in the chemical products industries were partly offset by increases in electrical and electronic products and primary metal industries.

The inventories to shipments ratio remained at 1.58 after rising in the previous two months.

Unfilled orders fell by 0.7% to \$26.5 billion. This represented a cumulative decline of 13.0% from the level in October 1989. New orders decreased



1.2% to \$23.2 billion, following declines averaging 1.1% in the previous four months.

For further information, order *Monthly Survey of Manufacturing* (catalogue number 31-001) or contact Industry Division at (613) 951-9497.

Seeding Intentions for Wheat Drop

In 1991, Canadian farmers intend to seed 32.7 million acres with all types of spring wheat. This represents a decrease of about 3% from 1990. The area seeded to durum wheat is expected to be 5.5 million acres, unchanged from last year.

According to seeding intentions, the total area seeded to oilseeds in 1991 is expected to be 10.3 million acres, 8% above the area seeded in 1990. The area intended for canola is 9% above last year's at 7.1 million acres. For flaxseed, the area is expected to remain relatively unchanged. Eastern farmers intend to seed a record 1.4 million acres of soybeans, 15% more than in 1990.

The total area that Canadian farmers intend to seed with coarse grains is estimated at 18.6 million acres, slightly below last year. The expected area for barley is unchanged from 1990. The intended

area of corn for grain is 2.6 million acres, also essentially the same as 1990. The area seeded with oats is expected to fall to 4.1 million acres.

Western farmers expect to increase their areas seeded with specialty crops by 20% to 2.1 million acres in 1991. The area of dry peas is expected to increase by 85% to 610 thousand acres. For mustard seed, the area is expected to decline by 25% to 445 thousand acres. The area seeded with canary seed is expected to decline 17%, while the intended areas of lentils and sunflower seeds are up 62% and 27% respectively.

Concerned with the low soil moisture reserves in most regions of the Prairies, farmers intend to keep 21.2 million acres in summerfallow, a level similar to last year.

For further information, order *Field Crop Reporting Series No. 2, March Intentions of Principal Field Crop Area, Canada*, (catalogue number 22-002) or contact Agriculture Division at (613) 951-8717.

PROVINCIAL PERSPECTIVES

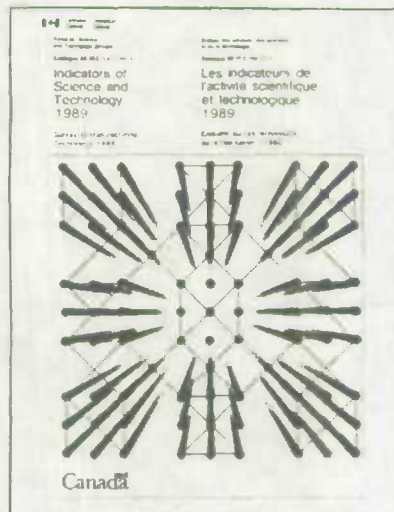
Seeding Intentions for Major Crops in 1991

	All wheat		Oats		Barley		All rye	
	'000 acres	area as % of 1990	'000 acres	area as % of 1990	'000 acres	area as % of 1990	'000 acres	area as % of 1990
Canada	33,573	96	4,082	92	11,896	101	990	70
Newfoundland	--	--	--	--	--	--	--	--
Prince Edward Island	15	109	24	96	70	99	--	--
Nova Scotia	6	71	18	90	16	89	--	--
New Brunswick	7	88	31	100	30	94	--	--
Québec	115	77	289	93	420	102	--	--
Ontario	580	68	260	87	540	108	70	108
Manitoba	4,925	91	450	90	1,550	97	150	60
Saskatchewan	20,330	99	1,050	84	3,700	101	510	65
Alberta	7,470	97	1,850	97	5,400	100	250	83
British Columbia	125	100	110	96	170	121	10	100

PUBLICATIONS RELEASED FROM MARCH 15 TO 21, 1991

Division/title	Period	Catalogue Number	Price: Issue/Subscription		
			Canada (\$Cdn.)	United States	Other Countries
				\$US	
AGRICULTURE					
Cereals and Oilseeds Review	December 1990	22-007	13.80/138	16.60/166	19.30/193
Livestock Report	January 1, 1991	23-008	16.50/66	19.75/79	23/92
CURRENT ANALYSIS					
Canadian Economic Observer	March 1991	11-010	22/220	26/260	31/310
EDUCATION, CULTURE AND TOURISM					
Focus on Culture	Spring 1991	87-004	6.25/25	7.50/30	8.75/35
Touriscope - International Travel - Advance Information	January 1991	66-001P	6.10/61	7.30/73	8.50/85
HOUSEHOLD SURVEYS					
The Labour Force	February 1991	71-001	17.90/179	21.50/215	25.10/251
INDUSTRY					
Cement	January 1991	44-001	5/50	6/60	7/70
Construction Type Plywood	January 1991	35-001	5/50	6/60	7/70
Coal and Coke Statistics	December 1990	45-002	10/100	12/120	14/140
Department Store Sales and Stocks	June 1990	63-002	14.40/144	17.30/173	20.20/202
Department Store Sales and Stocks	July 1990	63-002	14.40/144	17.30/173	20.20/202
Department Store Sales, Including Concessions, by Province and Metropolitan Area	December 1990	63-004	2.70/27	3.20/32	3.80/38
Factory Sales of Electric Storage Batteries	January 1991	43-005	5/50	6/60	7/70
Footwear Statistics	January 1991	33-002	5/50	6/60	7/70
Industrial Chemicals and Synthetic Resins	January 1991	46-002	5.60/56	6.70/67	7.80/78
Monthly Production of Soft Drinks	February 1991	32-001	2.70/27	3.20/32	3.80/38
New Motor Vehicle Sales	July 1990	63-007	14.40/144	17.30/173	20.20/202
Oils and Fats	January 1991	32-006	5/50	6/60	7/70
Particleboard, Waterboard and Fibreboard	January 1991	36-003	5/50	6/60	7/70
Primary Iron and Steel	December 1990	41-001	5/50	6/60	7/70
Production and Shipments of Blow-Moulded Plastic Bottles	Quarter Ended December 31, 1990	47-006	6.75/27	8/32	9.50/38
Production and Shipments of Steel Pipe and Tubing	January 1991	41-011	5/50	6/60	7/70
Pulpwood and Wood Residue Statistics	January 1991	25-001	6.10/61	7.30/73	8.50/85
Retail Trade	December 1990	63-005	14.40/144	17.30/173	20.20/202
INDUSTRY MEASURES AND ANALYSIS					
Gross Domestic Product by Industry	December 1990	15-001	12.70/127	15.20/152	17.80/178
INPUT-OUTPUT					
The Input-Output Structure of the Canadian Economy	1987	15-201	60	72	84
INTERNATIONAL TRADE					
Exports by Country	January-December 1990	65-003	82.75/331	99.25/397	115.75/463
Imports by Country	January-December 1990	65-006	82.75/331	99.25/397	115.75/463
Summary of Canadian International Trade	December 1990	65-001	18.20/182	21.80/218	25.50/255
SERVICES, SCIENCE AND TECHNOLOGY					
Indicators of Science and Technology	1989	88-002	18/72	21.50/86	25.25/101
TRANSPORTATION					
Passenger Bus and Urban Transit Statistics	October 1990	53-003	7.10/71	8.50/85	9.90/99
Service Bulletin - Aviation - Aviation Statistics Centre	March 1991	51-004	9.30/93	11.20/112	13/130

NEW FROM STATISTICS CANADA



Indicators of Science and Technology, 1989

A new Statistics Canada publication, *Indicators of Science and Technology*, presents the results of a survey on the use and planned use of 22 advanced technologies in Canadian manufacturing industries, and compares these results with those of a similar American survey. Here are some of the highlights of the publication:

- In 1989, 88% of Canadian manufacturing shipments were made by establishments using at least one of the 22 technologies surveyed. These establishments represented 48% of Canadian manufacturing establishments.
- In terms of shipment value, the five most used technologies are programmable controllers (64%), computers used for control on the factory floor (50%), computer-aided design and/or computer-aided engineering (49%), material requirements planning (49%) and local area computer networks for the exchange of technical data (41%).
- In terms of shipment value, 20% of small establishments (with annual shipments of less than \$10 million) used at least one technology, whereas 98% of establishments with annual shipments of \$500 million or more did so.
- Among the establishments that export at least half of their production, 95% (in terms of shipment value) use at least one technology and 74% use at least five. In comparison, only 76% of establishments that do not export (in terms of shipment value) use at least one technology, and 26% use at least five.

- In almost all cases, American establishments make a greater use of technology than Canadian establishments, regardless of the industry and the number of employees.

For further information, order *Indicators of Science and Technology 1989*, or contact Services, Science and Technology Division at (613)951-9919.

Focus on Culture

Canada has just released its Spring 1991 issue of *Focus on Culture*. This issue looks at Canadian-controlled publishing houses from the point of view of their linguistic affiliation, studies the evolution of funding for dance companies over the period from 1982 to 1988, and presents results of a survey of periodicals. Here are some highlights of the publication:

- The period between 1982-1983 and 1988-1989 was an era of expansion for Canadian-controlled publishing houses. The number of publishing houses with revenues over \$50,000 rose from 207 to 273 and their sales posted a real increase of 44% after allowing for inflation.
- Over half of the 1,534 periodicals produced by Canadian publishers in the 1988-89 fiscal year were published in English, 22% were published in French, and 16% were bilingual (English and French). Forty-seven publications in languages other than English and French accounted for the remaining 3%.
- Since 1982, earned funding (primarily through box office sales) has consistently remained at 43% or less of total revenues realized by dance companies. The remainder of total revenues came from government grants and corporate and individual donations.

For further information, order *Focus on Culture* (catalogue number 87-004) or contact Education, Culture and Tourism Division at (613)951-1566.

CANSIM Main Base Series Directory 1991

The 1991 *CANSIM Main Base Series Directory* is now available as a printed document or on compact disc (CD-ROM).

The directory serves as a guide to data contained in the CANSIM Time Series Data Base. Access to this data base is available world-wide through a number of on-line distributors.

To make searching through the *CANSIM Main Base Series Directory* easier and faster, a personal computer-searchable version is available on CD-ROM. The CD-ROM also contains a thesaurus of terms used by Statistics Canada, thereby helping in the search for information. Access to this reference material, and search and display software, is easy. A few key strokes at a personal computer will give information on topics ranging from farm cash receipts for livestock in Alberta to retail gasoline prices in Newfoundland.

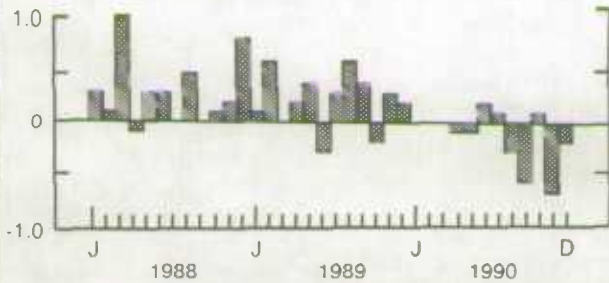
The publication with semi-annual amendments costs \$125; *StatCan: 1991 CANSIM Directory Disc* (compact disc) with a semi-annual update costs \$199.

For more information about the 1991 *CANSIM Main Base Series Directory*, contact the Electronic Data Dissemination Division (613-951-8200; FAX: 613-951-1134).

CURRENT TRENDS

Gross Domestic Product

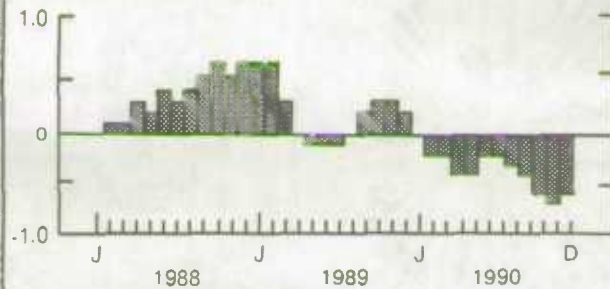
% change,
previous month



After a monthly decline of 0.7% in November, gross domestic product at factor cost fell 0.2% in December.

Composite Leading Indicator

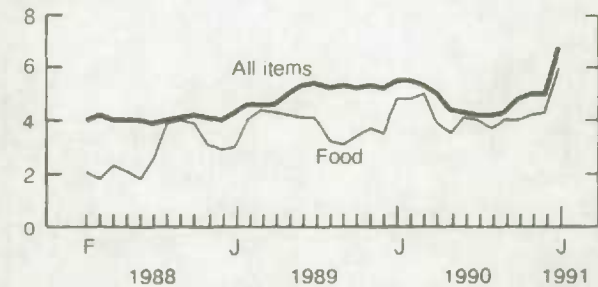
% change,
previous month



The leading indicator maintained its downward trend in December, dropping by 0.6%, slightly less than the 0.7% drop in November.

Consumer Price Index

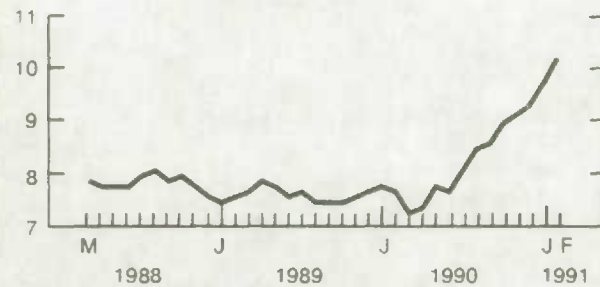
% change,
previous year



The Consumer Price Index registered a year-over-year increase of 6.8% in January, the highest in over seven years.

Unemployment Rate

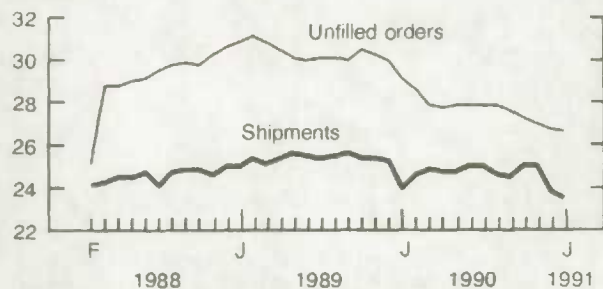
%



In February, the unemployment rate rose to 10.2%, a full three points above the eight-year low in March 1990.

Manufacturing

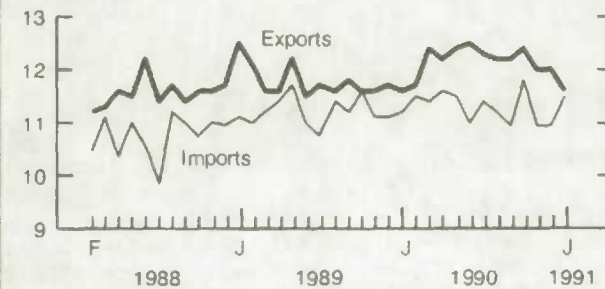
Billions
of dollars



In January, Canadian manufacturers' shipments fell 1.5% to \$23.4 billion, the lowest level in three years.

Merchandise Trade

Billions
of dollars



In January, imports rose by 5.0% to \$11.5 billion. Exports fell by 2.9% to \$11.6 billion.

Note: All series are seasonally adjusted except the consumer price index.

LATEST MONTHLY STATISTICS

	Period	Level	Change Previous Period	Change Previous Year
GENERAL				
Gross Domestic Product (\$ billion, 1986)	December	503	-0.2%	-1.7%
Composite Leading Indicator (1981 = 100)	December	139.9	-0.6%	-4.2%
Profits of Industrial Corporations (\$ billion)	3rd Q	5.2	13.6%	-29.5%
DOMESTIC DEMAND				
Retail Trade (\$ billion)	December	16.2	0.8%	-0.1%
New Motor Vehicle Sales ('000 units)	January	100.5	18.6%	-11.7%
LABOUR				
Employment (millions)	February	12.3	-0.5%	-2.6%
Unemployment Rate (%)	February	10.2	0.5	2.6
Participation Rate (%)	February	66.4	0.0	-0.8
Labour Income (\$ billion)	December	31.9	-0.3%	4.3%
Average Weekly Earnings (\$)	December	523.41	0.1%	5.4%
INTERNATIONAL TRADE				
Merchandise Exports (\$ billion)	January*	11.6	-2.9%	0.1%
Merchandise Imports (\$ billion)	January*	11.5	5.0%	2.4%
Merchandise Trade Balance (\$ billion)	January*	0.2	-0.9	-0.3
MANUFACTURING				
Shipments (\$ billion)	January*	23.4	-1.5%	-2.1%
New Orders (\$ billion)	January*	23.2	-1.2%	0.5%
Unfilled Orders (\$ billion)	January*	26.5	-0.7%	-9.0%
Inventory/ Shipments Ratio	January*	1.58	0.00	-0.02
Capacity Utilization (%)	4th Quarter	74	-3.6	-7.8
PRICES				
Consumer Price Index (1986 = 100)	January	125.0	2.6%	6.8%
Industrial Product Price Index (1986 = 100)	January	110.7	0.0%	1.8%
Raw Materials Price Index (1986 = 100)	January	114.4	-6.4%	8.0%
New Housing Price Index (1986 = 100)	January	133.4	-2.0%	-8.8%

Note: All series are seasonally adjusted with the exception of average weekly earnings and the price indexes.

** New this week.*

I·N·F·O·M·A·T

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