



# IN·F·O·M·A·T

## A WEEKLY REVIEW

Friday, October 22, 1993



### OVERVIEW

#### ■ Manufacturers' Shipments Post Moderate Gain

Canadian manufacturers' shipments increased 3.7% in August, counterbalancing decreases in April, May and July.

#### ■ Retail Sales Increase for Second Straight Month

Seasonally adjusted retail sales showed a slight increase of 0.3% in August after rising by 1.1% in July. This marked the fourth increase in the last five months.

#### ■ Planned Construction Activity Down in August

The seasonally adjusted value of building permits issued in Canada fell 3.3% in August, due entirely to a sharp drop in the non-residential sector.

#### ■ Rise in Imports Cuts Merchandise Trade Balance

The seasonally adjusted value of merchandise exports fell marginally in August while imports climbed to slash Canada's trade balance to \$596 million from \$1.3 billion in July.

#### ■ Decline in Same-day Car Trips to the United States Accelerates

In August, the seasonally adjusted number of same-day cross-border car trips by Canadian residents to the U.S. fell 3.5% from July to 3.9 million, and stood 17.2% below the level of August 1992.

#### ■ Canada Ranks High for Breast Cancer Among Women

Breast cancer incidence rates for Canada are among the highest in the world, exceeded only by those in the United States.

#### Manufacturers' Shipments Post Moderate Gain

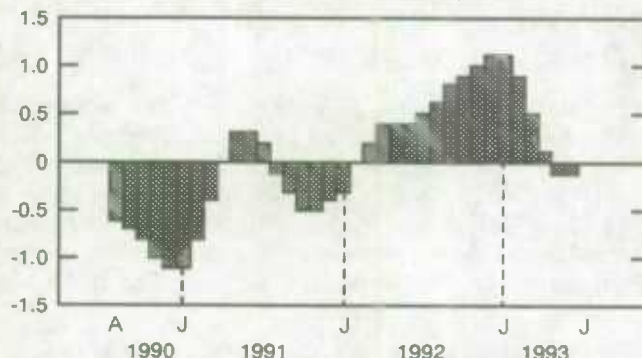
Canadian manufacturers' shipments rose 3.7% in August to a seasonally adjusted value of \$25.8 billion. The increase counterbalanced declines in April, May and July and pushed shipments for the first eight months of the year to \$201.8 billion, 8.2% higher than the value for the corresponding period in 1992.

Fifteen of 22 major industry groups, accounting for 83% of shipment values, recorded higher shipment levels while six decreased and one remained unchanged. A rise of 17.5% in the motor

(continued on page 2)

#### Shipments

Monthly percentage change in trend, seasonally adjusted



Note: The short-term trend represents a weighted average of the data.



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### ... Manufacturers' Shipments Post Moderate Gain

vehicle, parts and accessories industry and an increase of 7.8% in the wood industries accounted for most of the increase. There was little change in the rest of manufacturing.

Inventory levels were up by 0.8% to \$35.2 billion, the sixth straight monthly increase. The largest increases were in the electrical and electronic products (5.9%), wood (1.6%) and chemical (1.2%) industries. The inventories to shipments ratio declined from 1.41 in July to 1.37 in August.

The level of unfilled orders declined by 0.5% for the second straight month, to a level of \$24.4 billion. (Unfilled orders are a stock of orders which, if not cancelled, will contribute to future shipments). New orders, however, increased 3.7% to \$25.6 billion, and offset a drop in July.

### Retail Sales Increase for Second Straight Month

Seasonally adjusted retail sales edged up by 0.3% in August to \$16.3 billion, after rising by 1.1% in July. This marked the fourth increase in the last five months. Sales were also 4.7% higher than their year-earlier level of \$15.6 billion. The retail sales trend has been rising since February 1992, with monthly increases ranging between 0.3% and 0.5% since April 1992.

Sales rose in half of the 16 major trade groups in August but fell in the remaining eight groups. The food sector had the most significant increase. Sales by supermarkets and grocery stores rose 1.3%, their third monthly increase in the last four months.

### Planned Construction Activity Down in August

After an increase of 9.5% in July, the seasonally adjusted value of building permits issued in Canada fell 3.3% in August to \$2.2 billion. Despite this decline, August's total was 2.8% above the value of building permits issued in August 1992. The non-residential sector accounted entirely for the overall decrease due to the poor performance in industrial and commercial construction.

The value of non-residential permits dropped 9.6% to \$762 million, with declines shared by all regions except British Columbia where planned construction activity for commercial (+57.6%) and institutional (+43.6%) projects jumped sharply.

### Trends

The trend for shipments, which had been increasing for more than a year, declined marginally in May and June but remained unchanged in July. The trend for 12 major groups increased, although at a slower pace for nine of these groups.

Following three years of declines, the trend for inventories continued to advance for the fourth month in a row. For unfilled orders, the trend has been increasing since October 1992 but at a slower pace since February 1993. The trend for new orders, however, decreased for the fourth successive month after one year of growth.

The trend for the inventories to shipments ratio increased for the first time in two and a half years.

*For further information, order Monthly Survey of Manufacturing (catalogue number 31-001), or contact Industry Division at (613) 951-9832. (See also "Current Trends" chart on page 7.)*

In the automotive sector, the largest downward influence came from a 0.7% sales drop for motor vehicle and recreational vehicle dealers. This decline followed a gain of 2.9% in July. However, a 1.4% rise in sales by gasoline service stations partly offset the decline.

Retail sales in August fell in six provinces and in the Yukon but on a year-over-year basis, sales were up from year-earlier levels in all 10 provinces and in the Northwest Territories.

*For further information, order Retail Trade (catalogue number 63-005), or contact Industry Division at (613) 951-9682.*

The value of building permits for industrial projects plummeted 27.4% to \$143 million after an exceptionally large gain in July (68.0%). The downturn came mostly from Québec (-72.9%), British Columbia (-48.7%) and the Atlantic (-32.5%) region. Planned construction activity for commercial projects dropped 12.1% to \$354 million while the value of building permits for institutional projects rose 8.8% to \$265 million.

The value of residential building permits edged up by 0.5% in August to \$1.4 billion. Increases occurred in all regions except British Columbia (-8.9%) where multi-family dwelling projects fell 14.6%. The value of residential building permits for the January-August period showed a decrease of

*(continued on page 3)*



### ... Planned Construction Activity Down in August

6.1% compared to the same period in 1992. For that period, Ontario recorded the largest decrease (-18.6%) while British Columbia posted the biggest increase (9.0%).

Growth in the multi-family dwelling sector was moderate in August, increasing by 4.6% to \$464 million. Permits for single-family dwellings, however, fell slightly, by 1.3% to \$948 million.

For further information, order *Building Permits* (catalogue number 64-001) or contact Investment and Capital Stock Division at (613) 951-2025.

## PROVINCIAL PERSPECTIVES: BUILDING PERMITS

### Building Permits, August 1993

Unadjusted Data (Adjusted Data Not Available by Province)

Province/Territory	Total		Residential		Non-residential	
	(\$ millions)	% change, previous year	(\$ millions)	% change, previous year	(\$ millions)	% change, previous year
<b>Canada</b>	<b>2,301.9</b>	<b>6.9</b>	<b>1,515.4</b>	<b>6.4</b>	<b>786.6</b>	<b>7.7</b>
Newfoundland	26.3	-28.8	21.6	6.5	4.7	-71.9
Prince Edward Island	12.0	-30.0	8.4	3.9	3.6	-60.6
Nova Scotia	57.4	15.5	42.5	3.0	14.9	76.9
New Brunswick	49.4	2.9	36.3	26.9	13.1	-32.6
Quebec	413.4	-1.4	252.0	3.5	161.4	-8.2
Ontario	833.8	9.8	539.4	4.9	294.5	20.1
Manitoba	46.7	-1.3	32.0	7.8	14.7	-16.6
Saskatchewan	28.1	-16.6	12.7	-27.7	15.4	-4.4
Alberta	268.4	29.3	181.1	25.6	87.3	37.5
British Columbia	552.5	5.9	381.9	4.3	170.6	9.7
Yukon	7.0	37.0	5.5	10.8	1.5	921.8
Northwest Territories	7.0	-12.8	1.9	-62.8	5.1	75.5

### Rise in Imports Cuts Merchandise Trade Balance

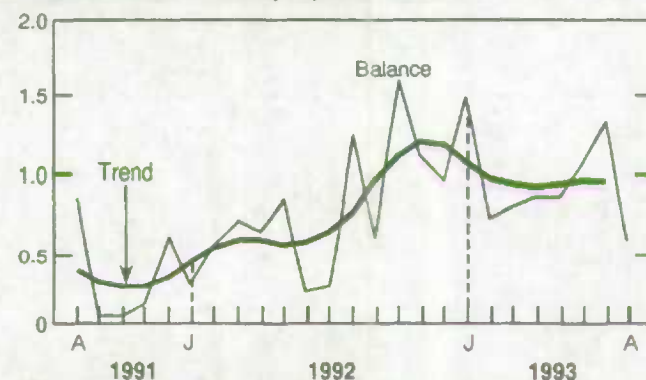
The seasonally adjusted value of merchandise exports fell marginally in August while imports climbed. As a result, Canada's trade balance declined by \$719 million to \$596 million, its lowest level since July 1992. However, the trade surplus totalled \$7.7 billion in the January-August period, \$3.0 billion higher than the level reached in the same period in 1992.

After falling for two straight months, the value of merchandise imports climbed 4.9% in August to \$14.3 billion. The largest increases in imports were in purchases of machinery and equipment, up \$450 million, as well as consumer goods (excluding cars), which rose by \$180 million.

In contrast, exports edged down to \$14.9 billion in August, following three consecutive months of increases. Sales of forestry and energy products slumped and wheat exports fell \$39 million. Trade with the United States remained strong with exports growing by \$234 million and imports by \$1.0 billion. As a result, Canada's trade surplus with the U.S. fell by \$771 million to \$1.4 billion.

### Merchandise Trade Balance

Billions of dollars, seasonally adjusted



### Underlying Trends

The imports trend has been increasing for nineteen months and the largest increases have been for imports from the United States and from non-OECD countries. The trends continued to increase for

(continued on page 4)

### ... Rise in Imports Cuts Merchandise Trade Balance

most commodity groupings but, as in the last few months, the trends for imports of energy, forestry and automotive products pulled down the imports trend.

For exports, the trend rose for the twentieth successive month and the strength came principally from trade with the U.S. The trend for exports to Japan has been down for two straight months and there were declines in the trends for exports to all other major trading partners.

## Decline in Same-day Car Trips to the United States Accelerates

The number of same-day automobile trips to the United States by Canadian residents continued to decrease for the fourth straight month, by 3.5% in August, to a seasonally adjusted level of 3.9 million. This marked the lowest level since December 1989. The trend in same-day cross-border car trips has been moving downward since February 1992, after peaking in November 1991.

Car trips of one or more nights to the U.S., however, increased slightly (0.3%) following declines of 4.1% in June and 1.3% in July. They were also down sharply from their August 1992 level.

### International Travel Between Canada and Other Countries

August 1993, Seasonally Adjusted

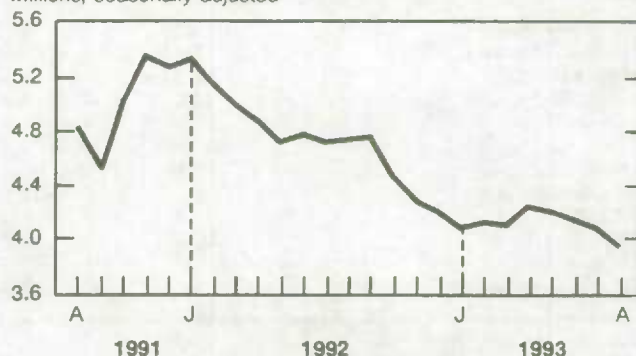
	('000)	% change previous month	% change previous year
<b>One or More Night Trips</b>			
Non-resident Travellers:			
United States	946	-1.8	-0.4
Other Countries	260	-1.2	7.2
<b>Total</b>	<b>1,206</b>	<b>-1.7</b>	<b>1.2</b>
Residents of Canada:			
United States	1,455	1.8	-5.6
Other Countries	279	3.2	7.6
<b>Total</b>	<b>1,734</b>	<b>2.1</b>	<b>-3.7</b>
<b>Auto Re-entries</b>			
Residents of Canada:			
Same-day	3,931	-3.5	-17.2
Overnight	1,017	0.3	-8.4

The trends increased for almost all commodity groupings, the exception being exports of forestry products which declined for the fourth month in a row. The overall trend for automotive exports was relatively unchanged but tended toward the negative.

For further information, order *Preliminary Statement of Canadian International Trade* (catalogue number 65-001P), or contact *International Trade Division* at (613) 951-9647. (See also "Current Trends" chart on page 7.)

### Same-day Trips by Canadian Residents to the United States, by Automobile

Millions, seasonally adjusted



Canadian residents' trips of one or more nights to all countries (by all modes of travel) rose 2.1%, the first increase in three months. The increase in the overall volume of resident travel was attributable to a 1.8% rise in the number of trips to the United States and a 3.2% increase in the number of trips to countries other than the United States.

The flow of foreign travellers to Canada declined in August. Trips of one or more nights to Canada by non-residents fell 1.7% after an increase of 2.1% in July. The level of this type of travel has fluctuated within a narrow band since late 1986. The number of trips of one or more nights to Canada by American visitors decreased 1.8% and comparable trips by travellers from other countries declined 1.2%.

For further information, order *International Travel - Advance Information* (catalogue number 66-001P), or contact *Education, Culture and Tourism Division* at (613) 951-1791.





# PUBLICATIONS RELEASED FROM OCTOBER 15 TO 21, 1993

Division/title of publication	Period	Catalogue Number	Price: Issue/Subscription		
			Canada (Cdn.\$)	United States	Other Countries
			US\$		
<b>CURRENT ECONOMIC ANALYSIS</b>					
Canadian Economic Observer	October 1993	11-010	22/220	26/260	31/310
<b>EDUCATION, CULTURE AND TOURISM</b>					
Tourism: International Travel, Advance Information	August 1993	66-001P	6.10/61	7.30/73	8.50/85
<b>HOUSEHOLD SURVEYS</b>					
The Labour Force	September 1993	71-001	17.90/179	21.50/215	25.10/251
<b>INDUSTRY</b>					
Canadian Forestry Statistics	1991	25-202	27	32	38
Corrugated Boxes and Wrappers	September 1993	36-004	5/50	6/60	7/70
Energy Statistics Handbook	October 1993	57-601	300	360	420
Department Store Sales and Stocks	June 1993	63-002	14.40/144	17.30/173	20.20/202
Gas Utilities, Transport and Distribution Systems	1992	57-205	27	32	38
New Motor Vehicle Sales	June 1993	63-007	14.40/144	17.30/173	20.20/202
Oils and Fats	August 1993	32-006	5/50	6/60	7/70
Particleboard, Waferboard and Fibreboard	August 1993	36-003	5/50	6/60	7/70
Primary Iron and Steel	August 1993	41-001	5/50	6/60	7/70
Pulpwood and Wood Residue Statistics	August 1993	25-001	6.10/61	7.30/73	8.50/85
Quarterly Report on Energy Supply-Demand in Canada	1993-1	57-003	31.75/127	38/152	44.50/178
<b>INDUSTRY MEASURES AND ANALYSIS</b>					
Gross Domestic Product by Industry	July 1993	15-001	12.70/127	15.20/152	17.80/178
<b>INTERNATIONAL TRADE</b>					
Preliminary Statement of Canadian International Trade	August 1993	65-001P	10/100	12/120	14/140
<b>PRICES</b>					
Consumer Price Index	September 1993	62-001	9.30/93	11.20/112	13/130
Farm Product Price Index	August 1993	62-003	7.10/71	8.50/85	9.90/99
<b>TRANSPORTATION</b>					
Passenger Bus and Urban Transit Statistics	August 1993	53-003	7.10/71	8.50/85	9.90/99
Railway Carloadings	August 1993	52-001	8.30/83	10/100	11.60/116
Railway Operating Statistics, Vol. 73, No.7	July 1993	52-003	10.50/105	12.60/126	14.70/147



## CURRENT TRENDS

### Gross Domestic Product

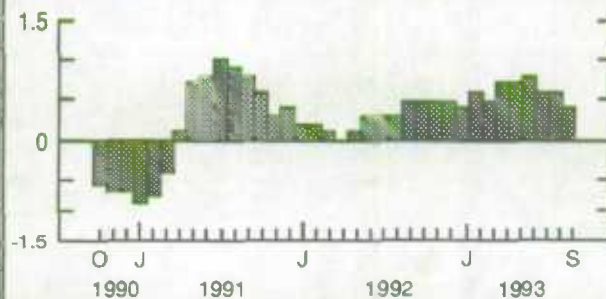
% change,  
previous month



Real gross domestic product at factor cost decreased 0.2% in July, largely due to lower output in manufacturing and mining.

### Composite Index

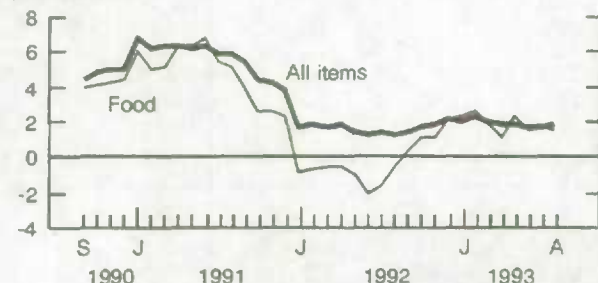
% change,  
previous month



After a revised gain of 0.6% in August, the composite index continued its year-long advance, increasing by 0.4% in September.

### Consumer Price Index

% change,  
previous year



The year-over-year increase in the all-items CPI was 1.7% in August and the food index rose by 1.4%.

### Unemployment Rate

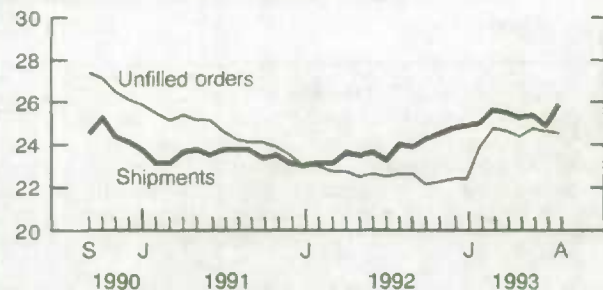
%



The unemployment rate fell from 11.3% in August to 11.2% in September.

### Manufacturing

Billions  
of dollars



Canadian manufacturers' shipments increased 3.7% in August to \$25.8 billion, while the level of unfilled orders slipped by 0.5% to \$24.4 billion.

### Merchandise Trade

Billions  
of dollars



In August, seasonally adjusted merchandise imports climbed 4.9% to \$14.3 billion, while exports edged down to \$14.9 billion.

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

## LATEST MONTHLY STATISTICS

	Period	Level	Change Previous Period	Change Previous Year
<b>GENERAL</b>				
Gross Domestic Product (\$ billion, 1986)	July	516.0	-0.2%	2.7%
Composite Leading Indicator (1981 = 100)	September	156.6	0.4%	7.2%
Operating Profits of Enterprises (\$ billion)	2 <sup>nd</sup> Quarter	14.0	22.8%	35.9%
<b>DOMESTIC DEMAND</b>				
Retail Trade (\$ billion)	August*	16.3	0.3%	4.7%
New Motor Vehicle Sales ('000 units)	August	98.7	-1.2%	-4.0%
<b>LABOUR</b>				
Employment (millions)	September	12.4	0.4%	1.5%
Unemployment Rate (%)	September	11.2	-0.1	-0.2
Participation Rate (%)	September	65.1	0.0	-0.2
Labour Income (\$ billion)	July	33.2	0.2%	2.5%
Average Weekly Earnings (\$)	July	561.29	0.3%	1.9%
<b>INTERNATIONAL TRADE</b>				
Merchandise Exports (\$ billion)	August*	14.9	-0.3%	10.8%
Merchandise Imports (\$ billion)	August*	14.3	4.9%	17.0%
Merchandise Trade Balance (\$ billion)	August*	0.60	-0.72	-0.62
<b>MANUFACTURING</b>				
Shipments (\$ billion)	August*	25.8	3.7%	7.5%
New Orders (\$ billion)	August*	25.6	3.7%	6.4%
Unfilled Orders (\$ billion)	August*	24.4	-0.5%	8.4%
Inventory/ Shipments Ratio	August*	1.37	-0.04	-0.06
Capacity Utilization (%)	2 <sup>nd</sup> Quarter	78.3	-0.2	3.3
<b>PRICES</b>				
Consumer Price Index (1986 = 100)	August	130.6	0.1%	1.7%
Industrial Product Price Index (1986 = 100)	August	112.8	0.6%	3.2%
Raw Materials Price Index (1986 = 100)	August	113.2	0.4%	5.3%
New Housing Price Index (1986 = 100)	August	136.5	0.1%	1.3%

*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

### A Weekly Review

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