



Infomat

A Weekly Review

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Friday, January 26, 1996

OVERVIEW

◆ Foreigners sell off Canadian securities

After boosting their holdings of Canadian short-term securities in October, foreigners redeemed them in November.

◆ Inflation rate drops below 2%

In December, the year-over-year increase in consumer prices fell below 2% for the first time since March 1995.

◆ Retail sales inch up

Led by consumer spending on automotive products and clothes, retail sales inched up in November 1995 after declining during the previous month.

◆ Wholesale trade expands

Wholesale merchants' sales rose in November following a decline in October.

◆ High technology essential for manufacturing growth

If Canadian manufacturing firms are to keep up with world standards, they must overcome specific obstacles to adopting high technology.

◆ Ontario and Quebec: Their similarities, their differences

Though some differences persist, basic demographic factors in Ontario and Quebec have converged over the years.

Foreigners sell off Canadian securities

After boosting their holdings of Canadian short-term securities in October, non-residents redeemed a net \$3.5 billion in November. Meanwhile, Canadian investors continued to buy foreign securities, adding a further \$0.7 billion in November.

Foreign selling in November of short-term Canadian paper reversed an investment of similar size in October. The bulk of November's disinvestment was evenly split between Government of Canada treasury bills and paper of federal government enterprises. The selling was roughly split between U.S., European (the two major buyers in October) and Asian investors.

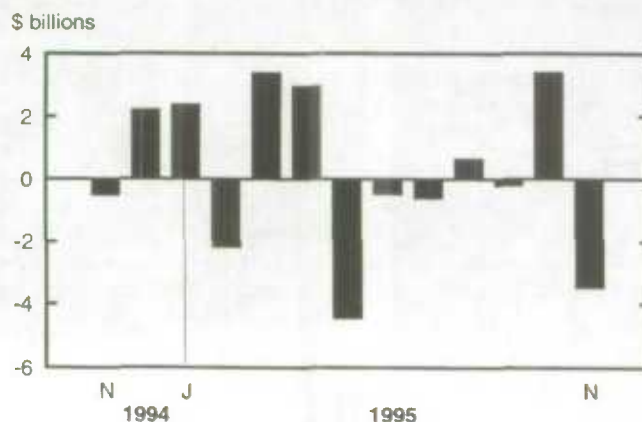
Foreign investment in Canadian bonds was a negligible \$0.2 billion. New issues of Canadian bonds sold to foreigners (\$2.5 billion) were sharply lower. These were offset by maturing bonds (\$1.9 billion) and foreign selling of outstanding bonds in the secondary market (\$0.4 billion).

Non-residents resumed their selling of Canadian stocks with a disinvestment of \$0.4 billion in November. Heavy selling of \$0.8 billion of existing shares was tempered somewhat by purchases of \$0.4 billion of new share issues, the largest in over a year.

Trading activity with non-residents jumped 20% in November, matching a similar rise in October. A volume of \$9.2 billion

(continued on page 2)

Foreign investment in Canadian money market paper

Statistics
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Canada

Canada

... Foreigners sell off Canadian securities

surpassed the record \$8.9 billion in June 1995. Canadian stock prices, as measured by the TSE 300 index, rose 4.5% in November, matching a similar increase in U.S. stocks.

Canadians continued to buy foreign securities, the bulk of which (\$0.6 billion) went into U.S. stocks. This was a shift from the first 10 months of 1995, when Canadian investment went predomi-

nantly into Japanese and European stocks. November's small investment in foreign bonds continued to go to overseas markets, bringing the year-to-date investment in foreign bonds to \$1.2 billion.

For further information, order *Canada's international transactions in securities* (catalogue 67-002) or contact Don Granger, Balance of Payments Division at (613) 951-1864.

Inflation rate drops below 2%

In December, for the first time since March 1995, the year-over-year increase in consumer prices fell below 2%. The consumer price index (CPI) was 1.7% higher than in December 1994, following a 2.1% increase in November. Notable price declines over this period were seen for clothing, fresh vegetables, and new houses, while strong price increases were registered for new vehicles, mortgage interest payments and paper products.

Between 1994 and 1995, the annual average increase in the CPI was 2.1%, a larger advance than the 0.2% rise between 1993 and 1994, when the annual average was strongly affected by the tobacco tax cuts. The rise in 1995 was comparable to those in 1993 and 1992, and all were smaller than any since 1965.

Between November and December, the CPI fell 0.1%. Clothing and traveller accommodation prices, which usually drop in December, posted an unusually sharp decline. Reduced prices were also found for new houses. Partly offsetting these declines were price increases for food, gasoline, piped gas and air transportation.

Clothing and footwear prices fell 2.4% in December. Earlier last fall, retailers raised prices and increased inventories in anticipation of higher consumer spending during the fall and holiday seasons. Consumers, however, remained guarded and their subdued spending forced retailers to substantially mark down prices in order to reduce stocks.

By province, monthly changes in the CPI ranged from a 1.1% decline in Prince Edward Island to a 0.3% rise in Manitoba. Three of the Atlantic provinces — Nova Scotia, New Brunswick and

Note to readers

Average annual indexes are obtained by averaging the indexes for the 12 months of each year. The percentage changes calculated from such averages are referred to as annual changes.

The Consumer price index, December 1995

% change, previous year*

Province / territory	All-items	Food	Energy	Housing	Transportation
Canada	1.7	1.9	0.8	0.7	4.0
Newfoundland	0.9	0.3	-0.6	0.8	3.2
Prince Edward Island	1.7	0.9	-0.4	1.0	3.9
Nova Scotia	0.8	-0.5	-0.1	1.2	2.7
New Brunswick	0.8	-0.9	2.0	1.5	3.0
Quebec	1.8	1.2	2.9	1.6	3.4
Ontario	1.9	2.8	1.1	0.6	4.9
Manitoba	2.4	3.8	0.2	1.7	4.3
Saskatchewan	1.6	1.9	-0.7	1.7	3.1
Alberta	1.7	2.6	-4.7	0.5	3.6
British Columbia	1.5	1.4	0.9	-0.9	3.4
Whitehorse	0.7	-0.6	-1.2	-0.9	4.7
Yellowknife	2.5	3.7	2.6	2.0	4.8

* Data are not seasonally adjusted.

Newfoundland — posted annual inflation rates below 1.0%. Over the same period, Manitoba registered the highest rate (2.4%).

For further information, order *The consumer price index* (catalogue 62-001) or contact Sandra Shadlock, Prices Division at (613) 951-9606. (See also "Current trends" on page 6.)

Retail sales inch up

Consumer spending inched up 0.2% in November, after declining 0.9% in October. The sales trend has leveled off in 1995, following general growth between early 1992 and the end of 1994. Cumulative sales from January to November 1995 were 2.8% higher than in the same period of 1994. Excluding the effect of price changes, the increase was closer to 0.6%.

November brought rising sales in four sectors, which accounted for 59% of total sales. The automotive and clothing sectors advanced most in dollar terms. These latest gains were partially offset by declines in the food, furniture, and general merchandise sectors.

Sales in the automotive sector (which includes new and used car dealers, gasoline service stations, and parts, accessories and services outlets) rose 0.7% after two consecutive monthly declines. The trend has been flat in recent months, following increases during the second and the third quarters. Sales by new and used motor vehicle dealers declined 0.2%, a third consecutive monthly drop. This decrease, however, was more than offset by retailers of parts, accessories and services whose sales climbed 4.2%, the strongest monthly advance since January 1994.

The clothing sector recorded a 1.2% rise in sales, after four successive monthly declines. Shoe stores and other clothing stores achieved an 8.9% and a 1.2% increase respectively. On the other hand, for the fifth consecutive month, sales were down in men's and women's clothing stores, coinciding with store

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... Retail sales inch up

closures that have been affecting the sector since the beginning of the year.

Across the country, retailers in five of the provinces and territories reported higher sales, while six posted decreases. Quebec retailers, whose sales increased for the fifth consecutive month, recorded the largest gain in dollar terms: 1.2%. As at the national level, the automotive and clothing sectors led the rise. These recent advances, however, were not sufficient to offset poor performance at the beginning of the year. Retail sales for the first 11 months of the year were down 0.7%.

In Ontario, retail sales remained virtually unchanged after decreasing in both September and October. Higher sales by the food, drug and clothing sectors were more than offset by declines in the automotive, furniture and general merchandise sectors, and by gasoline service stations.

Newfoundland and Manitoba showed a similar pattern of three monthly sales declines in the last four months. In November, sales were down 1.5% and 1.9% respectively. Despite these declines, cumulative sales for the first 11 months were up in both provinces.

Early indications for December sales point to a rise in the number of new motor vehicles sold. In addition, employment in trade jumped 1.3% from November to December. Media reports have indicated, however, that the Christmas shopping season was a disappointment for many retailers.

Retail sales

\$ billions, seasonally adjusted



Data prior to 1991 have been adjusted to remove the Federal Sales Tax to be comparable to January 1991 and subsequent data.

For further information, order *Retail trade* (catalogue 63-005) or contact Louise G  n  reux, Industry Division at (613) 951-3549.

Wholesale trade expands

Following a decline in October, wholesale merchants' sales grew 0.6% to \$20.2 billion in November. Though sales have fluctuated in recent months, November sales were 1.1% (\$221 million) higher than the low point reached in July. This contrasts with the weak, economy-wide demand in the first half of 1995, when wholesalers saw monthly sales drop 3.7% in July from the February 1995 peak.

Though the economy slowed during 1995, year-to-date sales were 6.5% higher than during the same period in 1994. This is partly attributable to price increases and the performance by wholesalers of export-oriented goods.

Sales rose in 7 of 11 trade groups (accounting for about 70% of total sales in November). Wholesalers of computer and packaged software (including other electronic machinery, equipment and supplies) posted the largest current-dollar increase (4.5% or \$81 million), followed by motor vehicles, parts and accessories (3.0%) and food products (1.5%).

The overall increase was partly offset by a 16.4% decline in wholesale sales of farm machinery, equipment and supplies. Monthly sales in this trade group have fluctuated considerably since January, though overall growth has been relatively flat in 1995. Year-to-date sales in this group jumped 12.0% from the same period in 1994.

Six provinces and territories recorded lower sales in November. All the Prairie provinces posted declines representing a combined drop of \$109 million from October. Lower sales of farm machinery, equipment and supplies contributed to their decline.

Retail and wholesale trade, November 1995

Seasonally adjusted

	Retail sales		Wholesale sales	
	\$ millions	% change, previous month	\$ millions	% change, previous month
Canada	17,674	0.2	20,207	0.6
Newfoundland	284	-1.5	185	-1.3
Prince Edward Island	80	2.7	49	6.3
Nova Scotia	522	0.9	461	1.9
New Brunswick	431	1.2	287	-0.4
Quebec	4,267	1.2	4,430	1.2
Ontario	6,463	0.0	8,906	1.0
Manitoba	601	-1.9	689	-1.0
Saskatchewan	555	-1.7	654	-3.1
Alberta	1,869	-0.3	1,923	-4.0
British Columbia	2,544	0.6	2,599	2.9
Yukon	19	-2.4	10	-9.7
Northwest Territories	40	-3.7	15	15.1

Inventories grew for the 21st straight month, climbing 0.9% to \$32.0 billion. The inventories-to-sales ratio was unchanged from October at 1.58, as the growth rate for both inventories and sales was about equal. The ratio remained one of the highest recorded in over two years (it was 1.60 in April 1993).

For further information, order *Wholesale trade* (catalogue 63-008) or contact Gilles Berniquez, Industry Division at (613) 951-9683.

High technology essential for manufacturing growth

The use of advanced technologies is essential for the economic growth and competitiveness of firms. A firm's technological competitiveness is determined by the speed and effectiveness with which it adopts advanced technology.

The main advantage of high technology is increased productivity. For most plant managers, the introduction of new advanced technologies led to higher productivity. More than three out of four plants that used advanced design and engineering, or fabrication and assembly technologies realized improvements in productivity.

If Canadian manufacturing firms are to keep up with world standards, they must overcome specific obstacles to adopting high technology. Financial costs, particularly for software, are among their biggest stumbling blocks. They must also cope with a lack of skilled employees and, in some companies, managers who do not necessarily want to take risks.

Four out of every five firms reported that they experienced various problems related to investment costs, such as capital and the high cost of equipment.

Several companies reported specific problems. Almost a quarter said software costs posed a particular headache, especially when it came to acquiring equipment made in Canada.

Note to readers

The data for this release is from Statistics Canada's 1993 Survey of Innovation and Advanced Technology. The survey covered 22 types of advanced technology belonging to six functional groups: design and engineering; fabrication and assembly; automated material handling; inspection and communications; manufacturing information systems; and integration and control.

Two out of five plants pinpointed difficulties associated with lack of skills and training among workers. Firms require skilled labour to effectively operate and maintain advanced technologies. Plant managers in the manufacturing sector felt that an inadequate supply of both skilled workers and existing training programs were barriers.

Almost a third of manufacturers identified impediments within their own organizations, specifically among managers' attitudes about high-tech. Some managers were willing to take more risks than others. Indeed, plant managers said such problems within their organizations were as frequently encountered as difficulties in persuading workers to accept the new technologies.

For further information, order *Benefits and problems associated with technology adoption in Canadian manufacturing* (catalogue 88-514E) or contact John Baldwin, Micro-Economics Analysis Division at (613) 951-8588; the Internet: baldjoh@statcan.ca.

Ontario and Quebec: Their similarities, their differences

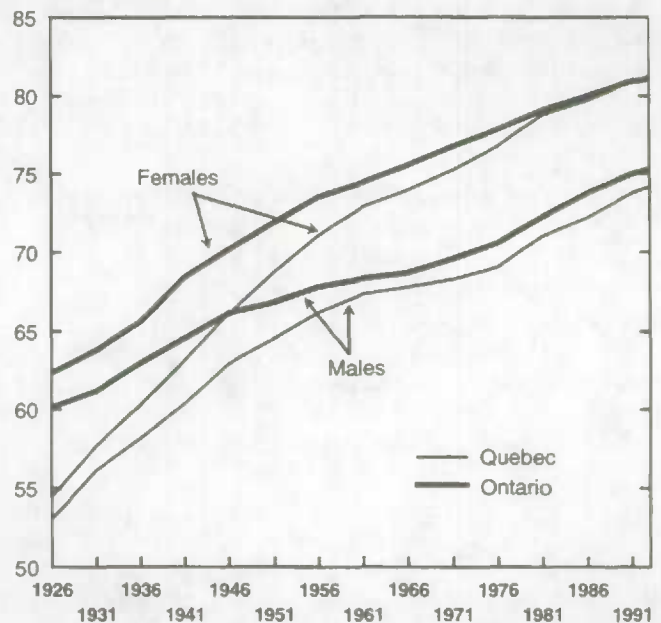
In the past, Ontario and Quebec have displayed different demographic behaviours. Today, differences in many demographic factors are barely noticeable, even though some dissimilarities persist. Basic demographic trends (such as fertility and mortality) have converged; life expectancy in the two provinces, for example, is now almost the same, while in 1926 women in Ontario generally lived 7.9 years longer — and men 7.1 years longer — than their counterparts in Quebec.

Quebec's population growth has mostly resulted from natural increase (more births than deaths), while immigration has played an important role in Ontario. Consequently, Quebec's population is more homogeneous than Ontario's, which has become more cosmopolitan. Differences in population growth have had two major consequences: Quebec's share of Canada's total population fell from 29% in 1961 to 25% in 1994; and Quebec's population has aged faster than Ontario's.

Marital behaviour continues to differ between Ontario and Quebec. Between 1971 and 1991, the marriage rate fell 18% in Ontario, compared with a 49% drop in Quebec. Common-law marriages are far more frequent in Quebec (30% in 1990) than in Ontario (18%). Today, most first births in Quebec are to unmarried women, most of whom are in common-law relationships. In Ontario, the proportion is much lower.

Quebec attracts and retains fewer immigrants than Ontario. Over the three decades ending in 1991, Quebec received 850,000 international immigrants, while 2.5 million settled in Ontario.

Life expectancy at birth, 1926-93



According to the 1991 Census, only 61% of the foreign-born individuals who settled in Quebec during the 1970s stayed, compared with 75% of those who went to Ontario.

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... Ontario and Quebec: Their similarities, their differences

Between 1901 and 1991, the proportion of foreign-born people in Quebec rose from 5.4% to 8.6%, an increase of 3.2 percentage points, compared with Ontario's rise of 8.7 percentage points. Consequently, in 1991, nearly 1 person out of 4 in Ontario was born outside Canada, compared with only 1 out of 12 in Quebec. Ontario also attracted more Canadians from other provinces. Internal migration patterns have thus contributed to the homogeneity of Quebec's population, which has changed little during the century. Still, about 9 out of 10 Quebec residents are born in the province, compared with nearly 6 out of 10 in Ontario.

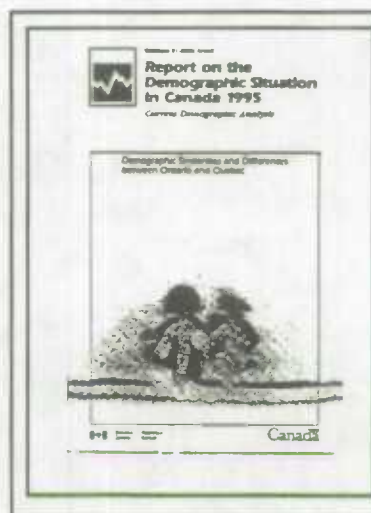
The francophone share of Quebec's population has held steady at 82% and experienced a two-thirds increase in its numbers, while

the anglophone population dropped from 14% to 9%. In Ontario, the number of anglophones doubled, though their share of the population fell from 82% in 1951 to 75% in 1991. The francophone population fell from 7% to 5%.

Over the past four decades, both provinces have experienced a four-fold increase in the number of allophones (individuals whose mother tongue is neither English nor French). As a result, the allophone share of the population has jumped from 4% to 9% in Quebec and from 11% to 20% in Ontario.

For further information, order *Report on the demographic situation in Canada, 1995* (catalogue 91-209) or contact Jean Dumas, Demography Division at (613) 951-2327.

New from Statistics Canada



Report on the demographic situation in Canada 1995

The 1995 edition of *Report on the demographic situation in Canada* is now released. As in the past, Part I of the report updates the emergent demographic trends in the different regions of the country, situating Canada among other industrialized countries. The report analyses trends in population growth, births, marriages, divorces, mortality, interprovincial migration rates, and international immigration. Particular attention is given to the characteristics of immigrants and to institutionalized populations, such as long-term residents in health-related facilities.

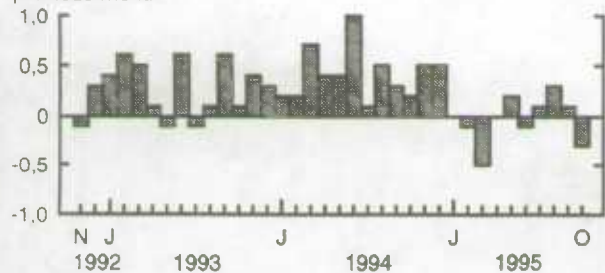
Part II examines the demographic similarities of Ontario and Quebec, as well as some differences.

Report on the demographic situation in Canada, 1995 (catalogue 91-209, \$30) is now available. For further information, contact Jean Dumas, Demography Division at (613) 951-2327.

Current trends

Gross domestic product

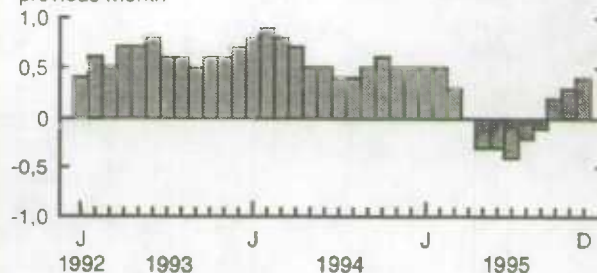
% change,
previous month



Real gross domestic product at factor cost fell 0.3% in October.

Composite index

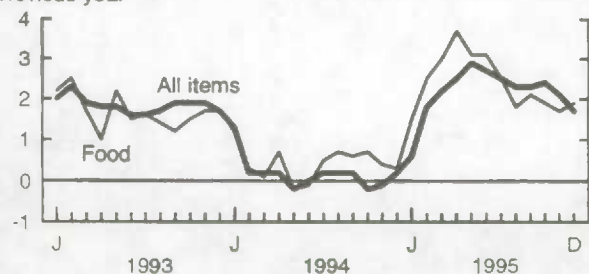
% change,
previous month



The composite index continued to rise in December, up 0.4% from the month before.

Consumer price index

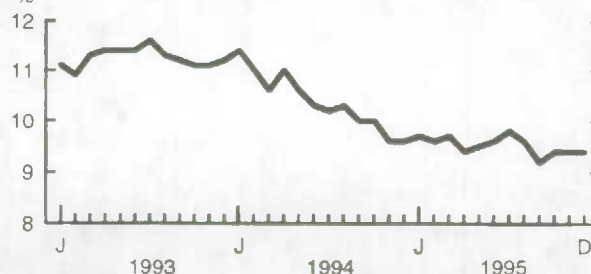
% change,
previous year



Consumers paid 1.7% more for goods and services in December 1995 than the year before. Food prices rose by 1.9%.

Unemployment rate

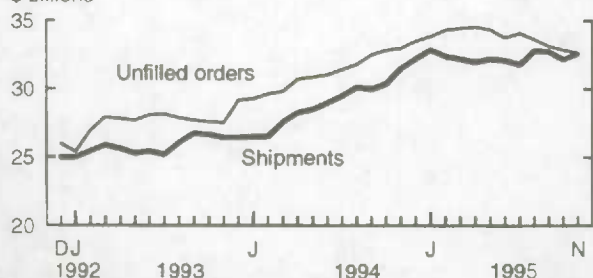
%



In December, for the third straight month, the unemployment rate remained unchanged at 9.4%.

Manufacturing

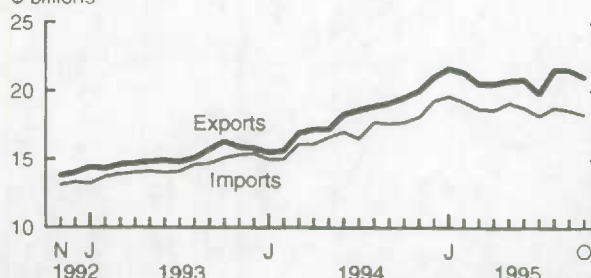
\$ billions



Manufacturers' shipments increased by 1.3% to \$32.6 billion in November. The level of unfilled orders fell 0.6% to \$32.6 billion.

Merchandise trade

\$ billions



The value of merchandise exports fell 2.5% to \$21.0 billion in October. Imports fell 1.9% to \$18.3 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)	October	542.3	-0.3%	0.7%
Composite index (1981=100)	December	172.9	0.4%	0.9%
Operating profits of enterprises (\$ billion)	3 rd quarter	25.0	3.2%	20.3%
DOMESTIC DEMAND				
Retail trade (\$ billion)	November*	17.7	0.2%	0.6%
New motor vehicle sales ('000 units)	November	96.4	0.5%	-8.7%
LABOUR				
Employment (millions)	December	13.6	0.4%	0.7%
Unemployment rate (%)	December	9.4	0.0†	-0.2†
Participation rate (%)	December	64.7	0.3†	-0.5†
Labour income (\$ billion)	October	35.1	-0.2%	2.7%
Average weekly earnings (\$)	October	574.49	0.0%	1.0%
INTERNATIONAL TRADE				
Merchandise exports (\$ billion)	October	21.0	-2.5%	7.3%
Merchandise imports (\$ billion)	October	18.3	-1.9%	3.3%
Merchandise trade balance (all figures in \$ billion)	October	2.7	-0.2	0.8
MANUFACTURING				
Shipments (\$ billion)	November	32.6	1.3%	3.6%
New orders (\$ billion)	November	32.4	1.5%	2.4%
Unfilled orders (\$ billion)	November	32.6	-0.6%	-0.9%
Inventory/ shipments ratio	November	1.40	-0.01	0.14
Capacity utilization (%)	3 rd quarter	83.1	-0.3†	-1.4†
PRICES				
Consumer price index (1986=100)	December*	133.9	-0.1%	1.7%
Industrial product price index (1986=100)	November	129.5	0.3%	5.5%
Raw materials price index (1986=100)	November	126.8	1.8%	1.0%
New housing price index (1986=100)	November	133.1	-0.3%	-2.1%

Note: All series are seasonally adjusted with the exception of the price indexes.

* new this week

† percentage point

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Division/title of publication	Period	Catalogue number	Price: Issue/Subscription		
			Canada (Cdn.\$)	United States	Other countries
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Adult correctional services in Canada	1994-95	85-211	32	39	45
Motor vehicle crimes	Vol.16, no.2	85-002	10/90	12/108	14/126
DEMOGRAPHY					
Report on the demographic situation in Canada	1995	91-209E	30	36	42
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Touriscope: International travel, advance information	November 1995	66-001P	7/70	9/84	10/98
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Marriages					
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Energy statistics handbook	January 1996	57-601	330	400	460
Mineral wool including fibrous glass insulation	December 1995	44-004	6/60	8/72	9/84
Monthly production of soft drinks	December 1995	32-001	3/30	4/36	5/42
Monthly survey of manufacturing	November 1995	31-001	19/190	23/228	27/266
Particleboard, waferboard and fibreboard	November 1995	36-003	6/60	8/72	9/84
Primary iron and steel	November 1995	41-001	6/60	8/72	9/84
Production and disposition of tobacco products	December 1995	32-022	6/60	8/72	9/84
PRICES					
The consumer price index	December 1995	62-001	10/100	12/120	14/140
TRANSPORTATION					
Railway carloadings	November 1995	52-001	10/100	12/120	14/140
Railway operating statistics	July 1995	52-003	12/120	15/144	17/168
Surface and marine transport service bulletin	vol. 12, no. 1	50-002	11/80	14/96	16/112

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* Release dates for International Trade, the Consumer Price Index and the Labour Force Survey are fixed; dates for other data series may change.

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- ▶ the level of sales in retail chain and department stores;
- ▶ what goods are being traded between Canada, U.S., and other countries;
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