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Infomat

A Weekly Review

Friday, September 8, 2000

OVERVIEW

- **GDP ends second quarter on a positive note**

  On the heels of a strong gain in May, gross domestic product advanced 0.4% in June. In each of the two months, manufacturing and the wholesaling of computers and peripheral equipment both contributed significantly to the advance.

- **High-tech propels economy to its 20th consecutive quarter of growth**

  In the second quarter, real gross domestic product increased 1.1%—the 20th consecutive quarter of growth. Producers of high-tech benefited from robust exports, while business investment was strong in new technology. However, excluding high-tech, the economy grew only 0.6%.

- **Current account surplus remains robust**

  The current account surplus in the second quarter reached $3.6 billion, robust for a second consecutive quarter. However, the current account surplus was down $1.3 billion from the first quarter, reflecting higher deficits for investment income and services.

- **Slower growth of energy costs curbs momentum of industrial prices**

  In July, the prices manufacturers get for their products recorded their weakest annual increase since November 1999 (+4.2%). The weakness was due to slower growth of energy costs, which also curbed the annual increase in raw material prices (+19.9%).

- **Fish farmers generate record revenues**

  Fish farmers generated record revenues in 1999 as product sales climbed to $548 million, up 7% over 1998. Exports were the driving force behind the revenue growth.

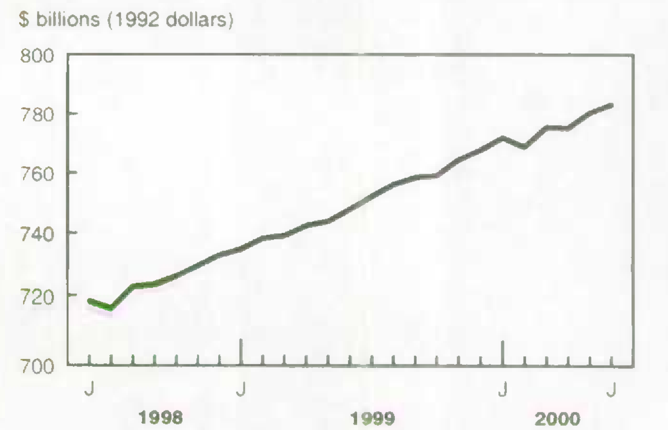
GDP ends second quarter on a positive note

On the heels of a strong gain of 0.7% in May, gross domestic product advanced 0.4% in June. In each of the two months, manufacturing and the wholesaling of computers and peripheral equipment both contributed significantly to the economy's overall advance. Excluding those areas of activity, growth in the rest of the economy was a modest 0.6% in May and 0.2% in June.

In June, higher manufacturing output accounted for about one-third of the overall advance. Factory output rose 0.7% in the wake of a 1.8% gain in May, extending the robust pattern of growth seen over the past 18 months. The rest of the increase was attributable to growth in wholesaling, business services and telecommunications services. The end of a strike also played a role by buttressing construction activity.

Production of electrical and electronic equipment rose 2.2%—the eighth consecutive monthly increase. The latest advance was led by another surge in the production of computers and peripherals, the latest in a series of gains that has led to a 54% expansion in this industry's production since January. Auto production rose 1.6% in June. Makers of cars and trucks essentially maintained the

Gross domestic product at factor cost



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... GDP ends second quarter on a positive note

previous month's pace of production, while parts producers cranked out 3.2% more of their goods, primarily to satisfy strong export demand from automakers in the United States.

Output of fabricated metal and non-metallic mineral products rebounded 2.0% and 1.5%, respectively, paralleling the upswing in construction activity. For their part, chemical product manufacturers raised output 2.9%, mostly owing to higher production of organic chemicals and pharmaceutical products.

However, sawmill output plunged 5.3% in June. Some producers took downtime and coastal mills in British Columbia were shut down because of a strike in the forestry and logging sector. Furniture makers curtailed production by 1.8% in June, only partly offsetting healthy gains in the three prior months. Output of clothing fell 2.0%, mostly due to a sharp drop in children's clothing manufacturing that was caused by a factory closure. As well, brewery output dropped for a third month, as cooler weather took the head off beer consumption.

Among wholesalers, a 1.6% sales increase in June was almost entirely ascribed to a sharp spike in computer and software distribution. This trade group's activity, which paused in the months around the year-2000 changeover, has recently returned to the vigorous growth that marked the previous three years. Retailers, for their part, enjoyed a modest gain of 0.4% in June. That occurred after sales fell in April and stayed flat in May. Soft auto sales have been the main cause of the lacklustre performance of retail sales since the beginning of the year.

Activity at construction sites intensified in June, following a strike in the first half of the month by about 600 cement truck drivers, which greatly slowed down activity in the Greater Toronto Area. Output on commercial, industrial, institutional and engineering projects appeared to get a boost from the end of the strike.

The mining sector's output edged up 0.1% in June—the 13th rise in the last 14 months. In June, the gains in mining activity were mostly offset by weakness in crude oil production and in drilling and rigging services. Natural gas production climbed significantly, however, reflecting increased flows of natural gas from eastern and northern Canada.

Financial industries' output fell 0.9% in June because of less activity at banks, securities dealers and stock exchanges. Recently, the sector has become more volatile due to the record volume swings for stocks traded on the key exchanges.

Utilities' output fell 0.7% in June. That followed robust gains in April and May. The decline was led by a 1.1% drop in electricity output, as a cooler-than-normal June reduced demand for air conditioning. However, the more heating-oriented gas distribution industry edged up 1.5%.

Note to readers

Monthly gross domestic product (GDP) by industry is valued at 1992 prices. The data are seasonally adjusted at annual rates.

*The June 2000 issue of **Gross domestic product by industry** (online at www.statcan.ca: 15-001-XIE, $11/$110) presents the full report. A print-on-demand version is also available at a different price. To order, or to purchase data, contact Yolande Chantigny (1 800 877-4623; imad@statcan.ca). For analytical information, contact Richard Evans (613-951-9145; evanric@statcan.ca), Industry Measures and Analysis Division.*

See also "Current trends" on page 7.

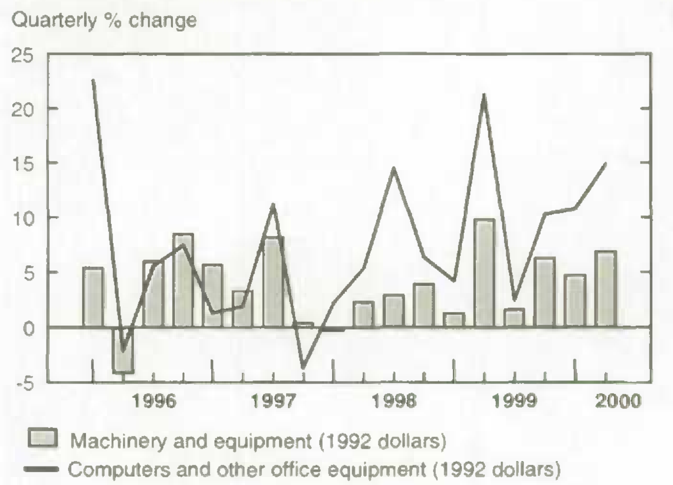
High-tech propels economy to 20th consecutive quarter of growth

In the second quarter, real gross domestic product (GDP) increased 1.1%—the 20th consecutive quarter of growth. Producers of high tech equipment benefited from strong export sales and business investment was strong in new technology. However, excluding high-tech, the economy slowed markedly, growing only 0.6% at quarterly rates, compared with 1.4% in the first quarter.

On the heels of a very strong first quarter (+4.1%), exports continued to advance strongly in the second quarter (+2.1%). Machinery and equipment exports jumped 11.4%. High-tech exports of computers, peripherals and telecommunications equipment were particularly robust, accounting for 12% of total exports of goods and services in nominal terms in the second quarter, compared with 11% in the first quarter.

Exports of goods and services other than high-tech fell 0.5%. Energy product exports dove (-4.4%) in tandem with sharp price increases. After three quarters of solid growth, motor vehicle exports fell. In the United States, personal spending on vehicles and parts dropped 15.9% in the second quarter.

Business investment in machinery and equipment



Investment in business machinery and equipment advanced 6.5%. The advance was led by investment in computers and other office equipment, which recorded a third consecutive quarter of double-digit gains, continuing the robust growth that started in 1998. Investment in transportation equipment jumped 11.6%, an

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... High-tech propels economy to 20th consecutive quarter of growth

increase related to equipment imported for the oil and gas industry. Without the high-tech increases, business investment in machinery and equipment rose 1.6%. Strong corporate profits continued to fund investment in capital assets. However, after five quarters of more robustness, the growth of corporate profits moderated to a 2.7% increase in nominal terms.

Investment in residential structures dropped 2.9%. The value of new housing construction dropped (-5.2%), as did ownership transfer costs (-2.9%), and renovation-related activity slowed. Housing starts fell to 142,100 dwelling units, down almost 13%, marking the first quarterly decline since the second quarter of 1998. Most of the fall occurred in Ontario, however, due to a strike by cement truckers.

Despite lower spending on motor vehicles, furniture and appliances, consumer expenditures grew 0.9%—the sixth consecutive quarter of strong growth. However, for goods, the rate of the spending growth was less than half the increase of the previous quarter (+0.5% compared with +1.3%). Consumer spending on services increased 1.2%. Weather-related expenditures were weak, as Canada experienced a wetter- and colder-than-normal spring. The bad weather meant that consumer demand for natural gas remained strong.

Gross domestic product at 1992 prices[1]

	% change	Annualized % change	Year-over-year % change
First quarter 1999	1.2	4.8	3.7
Second quarter 1999	0.8	3.3	4.3
Third quarter 1999	1.6	6.5	5.2
Fourth quarter 1999	1.2	5.1	4.9
First quarter 2000	1.2	5.1	5.0
Second quarter 2000	**1.1**	**4.7**	**5.3**

1 The change is the growth rate from one period to the next. The annualized change is the growth rate compounded annually. The year-over-year change is the growth rate of a given quarter compared with the same quarter of the previous year.

Note to readers

Real GDP measures changes in the volume of production by valuing output at the prices of a given base year, currently 1992. That base year will be updated to 1997 prices in the first quarter of 2001. Because prices of high-tech commodities have fallen substantially since 1992, the impact of the growth in these commodities may be currently overstated. After the update to 1997 prices, expenditures on high-tech commodities will remain as the engine that drove the economy in the second quarter of 2000; however, the post-revision growth rate of the overall economy will likely be lower.

Labour income growth accelerated to 2.5%, boosted by federal pay equity payments. Excluding this effect, labour income grew 1.4%, compared with 2.1% in the previous quarter. Personal income grew robustly, and the savings rate climbed to 4.4%.

Government revenues continued to exceed expenditures; the surplus for all levels of government remained at about $30 billion for a second consecutive quarter. Government credit market debt was further reduced. Revenues were boosted by corporate tax collections, and by royalties from the oil and gas industry at the provincial level. There was a sharp upturn of the provincial surplus.

Prices (measured by the GDP chain price index) rose 1.4% in the second quarter. That followed a 1.1% increase in the first quarter. The latest increase was primarily due to the federal pay equity payments that were made during the quarter. Excluding those payments, domestic prices were up 1.0%—indicating that inflation remains stable.

The second quarter 2000 issue of ***National economic and financial accounts, quarterly estimates*** *(13-001-XPB, $44/$145) presents the full report. For information about other products and services that are available on this subject, contact Client Services (613-951-3810; iead-info-dcrd@statcan.ca). For further analytical information, contact the Information Officer (613-951-3640), Income and Expenditure Accounts Division.*

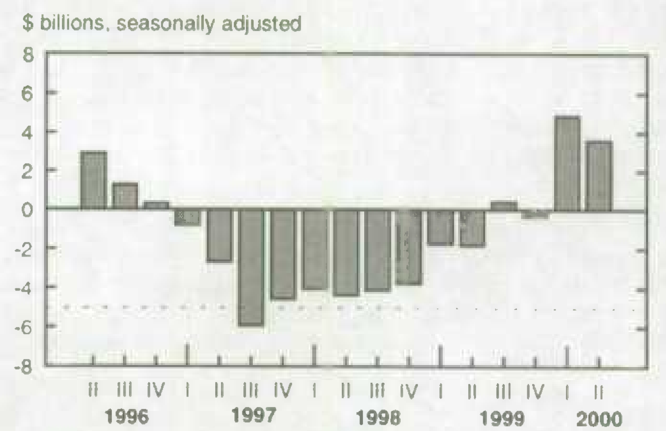
Current account surplus remains robust

For a second consecutive quarter, Canada generated a strong current account surplus, as its surplus in goods remained historically high. However, the current account surplus, at $3.6 billion (seasonally adjusted), was down $1.3 billion from the first quarter, reflecting higher deficits for investment income and services.

The goods surplus was $12.2 billion, slipping only marginally from the first quarter's record $12.3 billion. Strong growth was seen in both exports (+$3.4 billion) and imports (+$3.5 billion).

Imports of machinery and equipment posted record growth and reached a new high, followed by higher purchases of industrial goods and crude oil. Demand for communications equipment pushed up imports of industrial products, as did significant imports of transport equipment, including equipment for offshore oil operations.

Current account balance



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... Current account surplus remains robust

On the export side, very substantial gains in telecommunications goods made up half the unprecedented rise in machinery and equipment shipped abroad. Exports of energy products, various industrial goods and auto parts also rose. However, the overall result was partly offset by slower exports of cars, trucks and lumber.

Elsewhere in the current account, a $0.3-billion increase in the deficit on investment income primarily reflected higher profits accruing to foreign direct investors. The deficit on investment income remained near $7 billion. That compares with nearly $8 billion in 1999 and the latter half of 1998. The higher profits centred on the financial services, wood and paper, and transportation equipment sectors. Canadian direct investors generally earned lower profits on their foreign operations; however, the communications sector had higher earnings.

The services deficit widened. The travel deficit approached $0.6 billion, in line with levels seen over most of 1999, after narrowing to $0.2 billion in the first quarter. Lower spending by U.S. visitors accounted for the larger second-quarter deficit. The deficit on transportation services also increased, whereas the commercial services deficit narrowed mainly on financial services.

In the capital and financial account (not seasonally adjusted), for a second quarter in a row Canadian direct and portfolio investors invested substantial sums abroad. Canadian companies placed $17.7 billion—a new quarterly high. As in the first quarter, just over half went to buy up foreign companies. The largest investments were from the manufacturing, technology and energy industries. About half went to the United States and significant shares went to Europe and Asia.

Canadian investors have accelerated their rate of investment in foreign securities in each of the last four quarters. The second quarter's investment went entirely to equities ($17.2 billion), roughly split between overseas and U.S. shares. Almost half of the investment represented new shares that foreign companies issued to buy Canadian companies. The year-to-date investment in foreign equities was $28 billion, far surpassing the annual record of $20.5 billion set in 1999.

Sizeable increases occurred in other investment assets, notably higher foreign currency deposits by Canadian banks in their foreign affiliates. Loan assets also increased but were more widespread. However, Canada's international reserve assets were reduced for the first time in almost two years. The dollar lost a cent and a half to close the quarter at 67.54 U.S. cents.

The second quarter saw unprecedented inflows of direct investment by foreign companies, which invested a massive $25.9 billion in Canada—more than double the previous high. More than 60% came from foreign companies buying companies in Canada. Mostly, the investment went to "other industries" (including electrical and electronic products) and to the machinery and transportation equipment industry. The United States and continental Europe accounted for 95% of the investment.

Foreign demand for Canadian portfolio equities was again strong, though weaker than in the first quarter. A $10.8-billion inflow for stocks came mostly from Americans investing in technology shares. Meanwhile, foreign holdings of Canadian bonds were down for a second consecutive quarter, as retirements continued to outpace new issues. Their divestment of money market paper continued after a one-quarter pause; they have reduced holdings in five of the past six quarters.

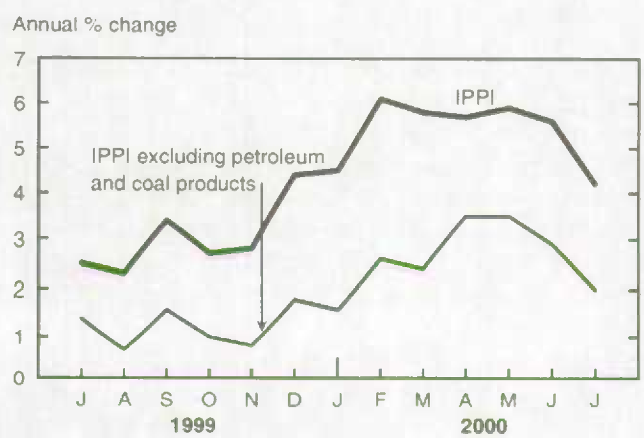
*The second quarter 2000 issue of **Canada's balance of international payments** (print: 67-001-XPB, $38/$124; online at www.statcan.ca: 67-001-XIB, $29/$93) presents the full report. For further information, contact Arthur Ridgeway (613-951-8907) or Denis Caron (613-951-1861), Balance of Payments and Financial Flows Division.*

Slower growth of energy costs curbs momentum of industrial prices

In July, the prices manufacturers get for their products recorded their weakest annual increase since November 1999 (+4.2%). The weakness was due to slower growth of energy costs. More than half of July's annual increase resulted from a 42.8% advance in petroleum and coal product prices, which was down from a 53.3% increase in June. Ignoring the impact of petroleum and coal product prices, industrial product prices increased 2.0% in July.

From June to July, industrial prices edged up 0.2%. Falling lumber prices were overtaken by rising prices for paper and paper products, motor vehicles and primary metal products. July was the first month in some time when petroleum prices had no perceptible influence on the monthly Industrial Product Price Index.

Industrial product price index



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... Slower growth of energy costs curbs momentum of industrial prices

The slower growth of energy costs also curbed the annual increase in raw material prices in July. This July, manufacturers paid 19.9% more for raw materials than they did in July 1999, primarily owing to higher prices for mineral fuels and animal products. This marked a deceleration from the 28.3% annual increase in June. If mineral fuels were excluded, the annual increase in raw material prices in July would have been only 5.5%.

Industrial product and raw materials price indexes, July 2000

	Index (1992=100)	% change, previous month	% change, previous year
Industrial product price index (IPPI)	**127.7**	**0.2**	**4.2**
IPPI excluding petroleum and coal products	125.5	0.2	2.0
Intermediate goods	129.1	0.2	5.2
Finished goods	125.7	0.1	2.9
Raw materials price index (RMPI)	**141.4**	**-2.4**	**19.9**
RMPI excluding mineral fuels	122.1	-0.4	5.5
Mineral fuels	183.3	-5.2	49.6
Vegetable products	111.7	-0.7	0.4
Animals and animal products	119.2	-0.3	13.1
Wood	139.2	-1.4	0.5
Ferrous metals	118.6	0.1	1.9
Non-ferrous metals	116.9	0.8	4.6
Non-metallic minerals	121.2	0.0	1.7

Note to readers

This article combines the Industrial Product Price Index (IPPI) and the Raw Materials Price Index (RMPI), which were previously reported in separate articles. The two have been combined to provide a consolidated view of industrial prices.

Raw material prices declined 2.4% from June to July. Weaker crude oil, log and cattle prices more than offset stronger hog and non-ferrous metal prices. If mineral fuels were excluded, the drop in overall raw material prices would have been less dramatic (-0.4%).

In July, crude oil prices fell 5.4%, as Saudi Arabia, the world's largest oil exporter, announced plans to boost output. Prices of petroleum and coal products rose only marginally in July (+0.1%).

The lumber market continued its downward trend in July. Prices dropped another 2.7%, as U.S. housing starts declined again in July. Prices were also down for logs. Pulp prices strengthened some more in July (+3.5%), reflecting robust global demand.

Following a brief downturn in June, the raw material price for hogs recovered in July (+2.7%), but cattle prices dropped for a third month (-2.6%). Low grain prices have reduced feed costs for cattle, prompting U.S. farmers to enlarge their herds.

The July 2000 issue of ***Industry price indexes*** *(62-011-XPB, $22/$217) will be available at the end of the month. For further information, contact Client Services (613-951-3350; fax: 613-951-1539; infounit@statcan.ca), Prices Division.*

Fish farmers generate record revenues

Fish farmers generated record revenues in 1999 as product sales climbed to $548 million, up 7% over 1998. Although the industry's rate of growth appears to have moderated from the 15% pace achieved in 1998, aquaculture is continuing to expand its contribution to the Canadian economy.

Exports were the driving force behind the 1999 revenue growth. Last year exports reached $386 million, an advance of 5% over 1998 and more than double the annual exports of the early 1990s. Last year, exports went largely to the United States, where demand for Canadian finfish—principally salmon—remained strong. Domestic sales, meanwhile, remained relatively flat.

Fish farmers in British Columbia and New Brunswick continued to be the industry's leading producers. Together these two provinces accounted for 85% of total sales of aquaculture products. British Columbia generated more than half of the sales, while New Brunswick made almost one-third. In both provinces, the industry is based largely on finfish operations, which accounted for 91% of total national sales last year.

Prince Edward Island, the country's largest producer of shellfish, continued to expand production last year. In 1999, revenue from the sale of shellfish reached $22 million, a jump of 11% over 1998. This amount represented more than half of Canada's total sales and, mirroring finfish, the sales growth coincided with a 10% gain in exports.

Product expenses (not including capital and labour costs) incurred by the industry also increased. Last year, these expenses rose to $368 million, a 7% increase over 1998. By far, the largest product expense was feed, which climbed 8% to $152 million.

The gross value added (the difference between gross output and product expenses) last year to the Canadian economy by the aquaculture industry was estimated at $241 million, an advance from 1998 of 11%. This was directly attributable to the growth in output (including inventories), which outpaced the increase in expenses.

Aquaculture statistics (production and value by province and species, exports and value added) will be available shortly in ***Livestock statistics—update binder*** *(23-603-UPE, $45/$149) and in* ***Agriculture economic statistics binder*** *(21-603-UPE, $26/$52). For further information, contact Bernadette Alain (902-893-7251, bernadette.alain@statcan.ca), Truro Agricultural Statistics Office or Tony Dupuis (613-951-2511, 1 800 465-1991, tony.dupuis@statcan.ca), Agriculture Division.*

New from Statistics Canada

Perspectives on labour and income
Autumn 2000

"Unemployment kaleidoscope" is the featured article in the latest issue of *Perspectives on labour and income*. It shows how changing the focus can dramatically alter perceptions of unemployment. For example, over the last two decades, an unemployment rate based on the family has been consistently higher than the official rate, which is based on the individual.

The second article in this issue compares Canada's taxes with those of other G-7 countries, while another article provides an in-depth look at Canada's payroll taxes in 1997. A fourth article adapts a Statistics Canada analytical report on the extent to which youths stay, leave or return to rural communities, primarily in their search for work. Finally, this issue looks at workers who are not union members but who are covered by a collective agreement. This article is accompanied by the annual update on union membership in Canada.

The Autumn 2000 issue of ***Perspectives on labour and income*** *(75-001-XPE, $18/$58) is now available. For further information, contact Henry Pold (613-951-4608; poldhen@statcan.ca), Labour and Household Surveys Analysis Division.*

Education quarterly review
August 2000

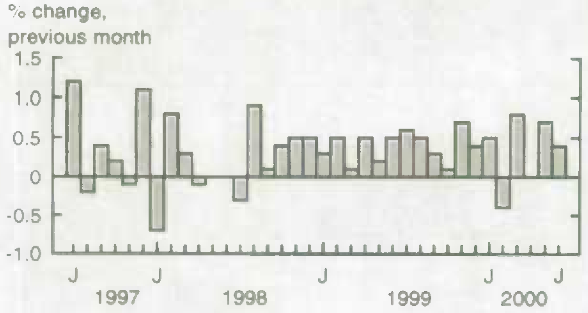
Statistics Canada's flagship publication for education statistics, *Education quarterly review*, analyses and reports on current issues and trends in education. The August 2000 issue features a report on recent trends in university education.

An analytical paper in this issue examines the factors that are important predictors of university and community college leaving. Another article profiles the characteristics of young people who responded to the 1991 School Leavers Survey, but who later failed to respond to the 1995 School Leavers Follow-up Survey.

The August 2000 (Vol. 6, no. 4) issue of ***Education quarterly review*** *(print: 81-003-XPB, $21/ $68; online at www.statcan.ca: 81-003-XIE, $16/$51) is now available. The study on recent trends in university education is available as a free preview article. Look for it at www.statcan.ca under "In depth". For further information, contact Jim Seidle (613-951-1500; jim.seidle@statcan.ca), Centre for Education Statistics.*

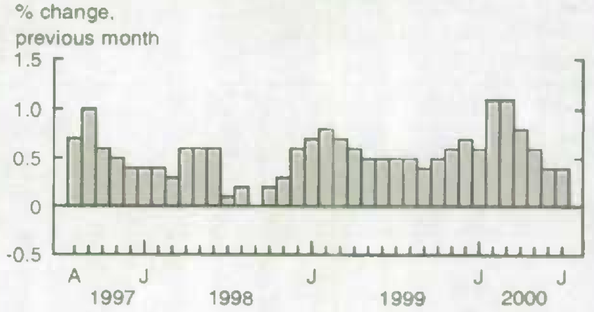
Current trends

Gross domestic product



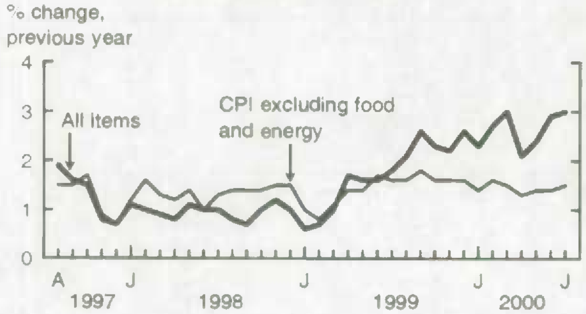
On the heels of a strong 0.7% gain in May, gross domestic product rose 0.4% in June.

Composite Index



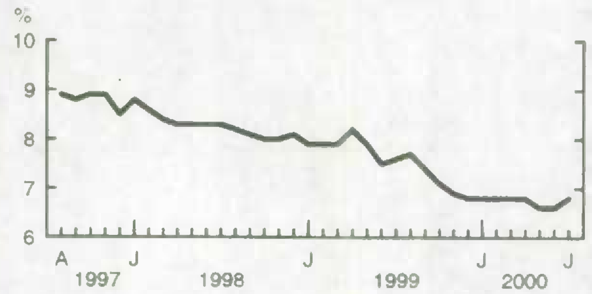
The leading indicator grew by 0.4% in July, the same rate as in june; 6 of 10 components posted gains.

Consumer Price Index



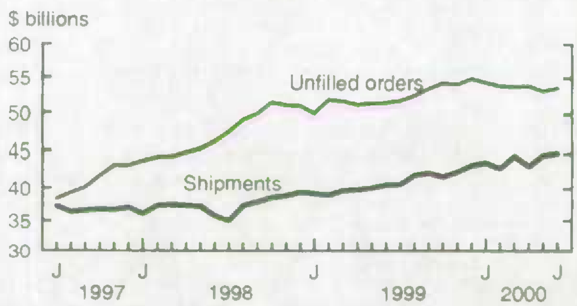
Consumer prices for goods and services were 3.0% higher in July 2000 than they were a year earlier. Excluding food and energy, prices rose 1.5%.

Unemployment rate



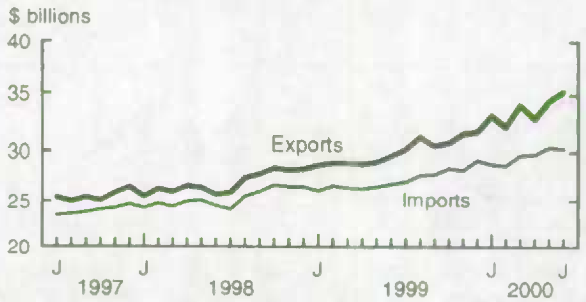
In July, the unemployment rate increased 0.2 percentage points to 6.8%.

Manufacturing



Manufacturers' shipments rose 0.7% in June to $45.1 billion. The backlog of unfilled orders increased 0.6% to $53.6 billion.

Merchandise trade



In June, the value of merchandise exports advanced 2.3% from May to $35.3 billion. Imports edged down 0.4% to $30.4 billion.

Note: All series are seasonally adjusted except the Consumer Price Index.

Latest statistics

	Period	Level	Change, previous period	Change, previous year
GENERAL				
Gross domestic product ($ billion, 1992)	June	783.3	0.4%	4.7%
Composite Index (1992=100)	July	163.8	0.4%	8.0%
Operating profits of enterprises ($ billion)	Q2 2000	51.9	1.7%	21.6%
Capacity utilization (%)	Q1 2000	87.6	1.1†	4.3†
DOMESTIC DEMAND				
Retail trade ($ billion)	June	22.9	0.8%	6.3%
Department store sales ($ billions)	July*	1.58	2.6%	1.9%
New motor vehicle sales (thousand of units)	June	133.9	3.6%	7.5%
Wholesale trade ($ billion)	June	32.2	0.3%	8.4%
LABOUR				
Employment (millions)	July	14.87	-0.1%	2.3%
Unemployment rate (%)	July	6.8	0.2†	-0.8†
Participation rate (%)	July	65.6	-0.1†	0.0†
Average weekly earnings ($)	June	626.29	0.1%	2.7%
Help-wanted Index (1996=100)	August*	170	-0.6%	5.6%
INTERNATIONAL TRADE				
Merchandise exports ($ billion)	June	35.3	2.3%	19.5%
Merchandise imports ($ billion)	June	30.4	-0.4%	13.3%
Merchandise trade balance (all figures in $ billion)	June	5.0	0.9	2.2
MANUFACTURING				
Shipments ($ billion)	June	45.1	0.7%	11.4%
New orders ($ billion)	June	45.5	3.0%	12.2%
Unfilled orders ($ billion)	June	53.6	0.6%	4.1%
Inventory/shipments ratio	June	1.30	-0.01	0.01
PRICES				
Consumer Price Index (1992=100)	July	114.1	0.4%	3.0%
Industrial Product Price Index (1992=100)	July	127.7	0.2%	4.2%
Raw Materials Price Index (1992=100)	July	141.4	-2.4%	19.9%
New Housing Price Index (1992=100)	June	103.0	0.0%	2.4%

Note: *All series are seasonally adjusted with the exception of the price indexes.*
** new this week*
† percentage point

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A weekly review

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Products released from August 31 to September 6, 2000

Subject area/Title of product	Period	Catalogue number	Price ($) (issue/subscription)
AGRICULTURE			
Cereals and oilseeds review	June 2000	22-007-XIB	11/112
Cereals and oilseeds review	June 2000	22-007-XPB	15/149
Farm cash receipts	First half 2000	21-001-XIB	15/48
ANALYTICAL STUDIES			
Analytical Studies Branch research paper no. 152: Rural youth—stayers, leavers and return migrants	1991-96	11F0019MIE	no charge
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