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Infomat
A Weekly Review

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INSIDE

◆ **Largest gain in seven months for leading indicator**

The composite leading index in February posted its largest increase in seven months, up 0.3%, driven by renewed vigour in housing-related demand. Overall, five components were up (two more than in January), while three fell and two were unchanged.

◆ **Slight decline in industrial capacity use**

Industrial capacity use declined marginally during the fourth quarter in the wake of declining automobile exports and a softening demand for goods in the American market. Industries operated at 82.9% capacity in the last three months of 2002, down 0.2 percentage points from the third quarter. It was the first decline in the rate since the fourth quarter of 2001.

◆ **Manufacturers begin the year with strong performance**

Manufacturers began the year with a strong performance, as January shipments rose 3.7% to $44.7 billion, new orders jumped 2.9% and inventories fell 0.2%. January's increase in shipments followed two consecutive declines.

◆ **Productivity falls for first time in two years**

Labour productivity in Canada's business sector declined for the first time in two years in the fourth quarter, as economic activity slowed and employment grew. Productivity fell 0.6% in the fourth quarter from the third, halting a series of eight consecutive quarterly increases.

Merchandise trade surplus rebounds

Canada's trade surplus with the rest of the world rebounded in January after falling for two consecutive months, as exports rose and imports fell. Merchandise exports rose 1.3% to just under $35 billion, while imports fell 1.3% to $30.0 billion.

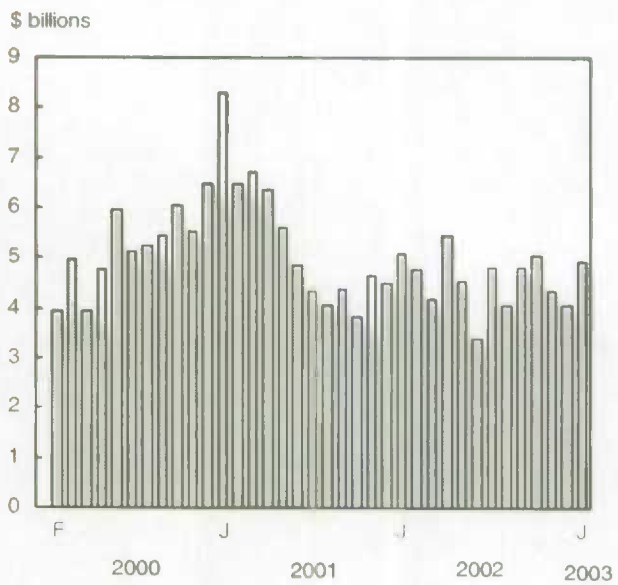
As a result, Canada's trade balance with the rest of the world rose from $4.1 billion in December to $4.9 billion in January.

Strong energy exports and a half-billion dollar turn-around in aircraft exports contributed to the largest single monthly jump in exports in six months. Import declines occurred in automotive products and in machinery and equipment, the two largest import sectors.

Exports to the European Union, which accounted for 6.2% of the total, rose 27.2% to $2.2 billion. Exports to the United States

(continued on page 2)

Trade balance



Merchandise trade surplus... *(continued from page 1)*

(84% of the total) were virtually unchanged at $29.3 billion. Imports from Japan and the European Union fell by a combined $631 million in January.

In addition, imports from Canada's various smaller trading partners fell $340 million. Partly offsetting these declines were increases in imports of goods from the United States and other OECD countries.

Canadian companies sent $29.3 billion in goods to the United States in January, while imports from south of the border increased 2.0% to $21.4 billion. The trade surplus with the United States fell $360 million to $8.0 billion.

Exports of energy products increased 7.6% to $5.6 billion, the fifth monthly rise in a row, aided by record levels of petroleum and coal products ($1.0 billion) and crude petroleum ($2.0 billion). Natural gas exports to the United States jumped 11.1% to $2.3 billion, as volumes and prices increased in response to colder-than-usual weather in North America.

In the machinery and equipment sector, exports rose 4.6% to $8.1 billion. The increase was driven by a dramatic 40.5% gain in aircraft, engines and parts to $1.6 billion, following layoffs and slow sales in December. Industrial and agricultural machinery exports increased 2.4% to $1.7 billion, but other machinery and equipment exports, including telecom, office machines and heavy equipment and tools, fell 2.7% to $4.3 billion.

Exports of automotive products rose 1.3% to $7.5 billion in January, breaking a four-month decline. Passenger automobile exports bounced back with a 3.6% increase to $3.6 billion following five months of decline, as international demand rebounded and manufacturers restarted production lines after an extended Christmas shutdown.

Decreases in imports, mainly from Japan and European trading partners, offset increased imports from the United States.

Imports of automotive products fell 7.4% to $6.7 billion in January from December's record high. Although Canadians purchase far more North American vehicles than those built in Europe or Asia, the bulk of January's decline in passenger auto imports was at the expense of those assembled in the United States. Imports of passenger autos fell 24.0% to $2.1 billion.

Imports in the largest sector, machinery and equipment, fell 1.8% to $8.7 billion. Industrial and agricultural machinery imports fell 1.7% to $2.3 billion. Industrial machinery imports led with a 2.6% drop to $1.3 billion. Imports of "other" machinery, which includes high-tech equipment, fell 3.7% to $3.8 billion.

Tensions in oil-producing countries and cold weather contributed to a 9.0% increase in imported energy products to $1.6 billion.

Canadian international merchandise trade *(Internet: 65-001-XIB, $14/$141) is now available. For more information, contact Daryl Keen (613-951-1810), International Trade Division.* *(See also "Current trends" on page 7.)*

Travel to Canada down for the first time since June

Travel to Canada declined 2.9% in January, the first monthly decline since June 2002.

In January, the number of travellers from the United States fell 3.1% to an estimated 3.4 million, the result of a decrease in both same-day and overnight trips to Canada. Although the number of overnight trips by Americans declined 1.7% from December to less than 1.4 million, January still had the second highest monthly numbers on record. The number of overseas travellers to Canada also decreased (-0.6%) to 358,000.

Canadian travel to the United States and overseas countries declined 0.3% from December. Canadians made more than 3.4 million trips abroad in January; of these, 3.0 million were to the United States, down 0.3% from December. Canadians also made 424,000 trips to overseas countries, a marginal decline (-0.2%) from December's record-setting figure.

The January 2003 issue of ***International travel, advance information*** *(Internet: 66-001-PIE, $6/$55), is now available. For general information, contact Client Services (1-800-307-3382; 613-951-7608; cult.tourstats@statcan.ca). For analytical information, contact Frances Kremarik (613-951-4240; frances.kremarik@statcan.ca), Culture, Tourism and the Centre for Education Statistics.*

Largest gain in seven months for leading indicator

The composite leading index in February posted its largest increase in seven months, up 0.3%, driven by renewed vigour in housing-related demand. Overall, five components were up (two more than in January), while three fell and two were unchanged.

The growth of the leading index was hampered through most of 2002 by a bear market for stocks and a slumping US economy, culminating in no growth in November. Growth accelerated to 0.2% in December as domestic demand strengthened. January's gain was revised up from 0.1% to 0.2%.

Housing rebounded strongly in February after a brief dip the month before. The increase was boosted by the volatile multiple units component, which, despite cold weather, nearly doubled to regain its highest level since the late 1970s. Spurred by the gains in housing, furniture and appliance sales recorded their largest increase in nine months.

Of the three manufacturing components, two declined: new orders for durable goods and the ratio of shipments to stocks. These largely reflect cuts in the auto and computer and electronic sectors in response to weak exports.

The US leading indicator began the new year with a 0.1% increase, but, unlike Canada, there were only limited gains outside of the financial market components. The increase in building permits was confined to single-family homes, where, unlike Canada, growth in demand was partly at the expense of multiples.

*For more information on the economy, the February issue of **Canadian economic observer** (Internet: 11-010-XIB, $17/$170; paper: 11-010-XPB, $23/$227) is now available. For more information, contact Francine Roy (613-951-3627), Current Economic Analysis Group. (See also "Current trends" on page 7.)*

Canadian social trends

Each quarter, *Canadian social trends* integrates data from many sources to examine emerging social trends and issues. The spring 2003 issue contains six articles.

The article "Traumatic life events" looks at how many Canadians have to cope with difficult events such as serious illness, injury, or death of a friend or family member; "Pockets of belief: Religious attendance patterns in Canada" examines the factors that influence the level of religious attendance, including demographics, immigration patterns and the cultural history of a region; and "Family violence against seniors" uses self-reported data from the 1999 General Social Survey on victimization, the most recent survey data available on abuse against older adults.

*The Spring 2003 issue of **Canadian social trends** (Internet: 11-008-XIE, $8/$27; paper: 11-008-XPE, $11/$36) is now available. For more information, contact Warren Clark (613-951-2560; cstsc@statcan.ca), Housing, Family and Social Statistics Division.*

New motor vehicle sales plummet

The withdrawal of some incentive programs in January contributed to the 14.1% drop in the number of new motor vehicles sold during the month. This is the steepest drop since January 1998, when the ice storm slowed new motor vehicle sales in the affected provinces. Motor vehicle dealers sold 129,036 new vehicles in January, down 21,145 units from the peak reached in December.

In January, new motor vehicle sales were down from December in all provinces, but the decrease was much smaller in the region formed by British Columbia and the three territories (-0.9%). Alberta (-9.5%) and Quebec (-12.5%) were the only other provinces to post declines smaller than the national average.

*The January 2003 issue of **New motor vehicle sales** (Internet: 63-007-XIB, $13/$124) is now available. For general information, contact Client Services (1-877-421-3067; 613- 951-3549; retailinfo@statcan.ca). For analytical information, contact Clérance Kimanyi (613-951-6363; clerance.kimanyi@statcan.ca), Distributive Trades Division.*

Slight decline in industrial capacity use

Industrial capacity use declined marginally during the fourth quarter in the wake of declining automobile exports and a softening demand for goods in the American market. Industries operated at 82.9% capacity in the last three months of 2002, down 0.2 percentage points from the third quarter. It was the first decline in the rate since the fourth quarter of 2001.

Despite this slight decrease in the fourth quarter, the rate was still above the average of 82.5% for 2002 as a whole.

The drop in exports in the fourth quarter was only partly offset by strong consumer spending. Declining exports of automotive products in particular had a negative impact on industrial production, and were a major factor in the downturn in industrial capacity use from October to December. To a large extent, this reflected a weaker demand for products in the United States as a result of the slowdown in the American economy.

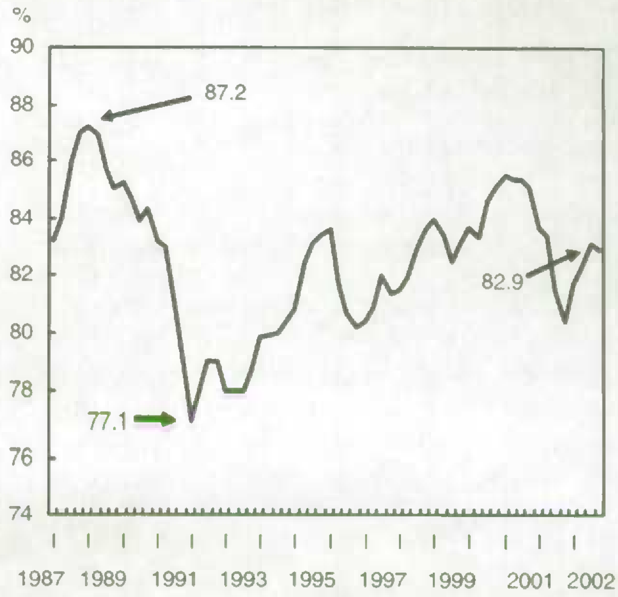
Moreover, industries' investments in plants and equipment fell 6.4% in 2002, despite sustained growth in profits. The Survey of Capital and Repair Expenditures also projected a drop in industries' investment for 2003. Domestic demand, however, experienced a slight rebound in the quarter and consumer expenditures increased, especially for motor vehicles and residential durable goods.

The drop in the rate in the fourth quarter was also attributable to lower capacity utilization in forestry and logging, mining and oil and gas extraction, and electric power. The rate remained steady in the manufacturing sector and rose slightly in the construction sector. (Rates of capacity use have been revised back to the first quarter of 2000 to incorporate revisions in source data).

Industrial capacity utilization rates

	Fourth quarter 2002	Third to fourth quarter 2002	2002	2001 to 2002
	%	% point change	%	% point change
Total industrial	**82.9**	**-0.2**	**82.5**	**0.2**
Forestry and logging	80.3	-1.4	77.4	0.6
Oil and gas extraction	66.7	-1.2	67.6	-2.0
Mining	81.4	1.8	80.9	-9.9
Electric power generation, transmission and distribution	88.3	-1.2	88.5	1.0
Construction	86.1	0.1	86.0	-0.4
Manufacturing	84.3	0.0	83.5	1.6

Industrial capacity utilization rate



After three consecutive quarterly increases, the capacity utilization rate in the manufacturing sector remained steady at 84.3%, the same as in the third quarter.

Thirteen of the 21 industrial groups in the manufacturing sector reduced their capacity utilization. The drop in transportation equipment was offset by rising rates in chemicals, wood products, machinery and primary metals.

Transportation equipment manufacturers reduced their capacity utilization from 91.3% in the third quarter to 88.9% in the fourth. Strong domestic demand for motor vehicles was not enough to offset the drop in motor vehicle exports in the fourth quarter.

Total exports of automotive products posted their biggest drop since the fourth quarter of 1996, and exports of passenger cars alone fell 17.0%. This led to a drop of 8.0% in motor vehicle production. Labour disputes and persistent problems in air transportation were at the root of reductions in aircraft production.

Capacity use in the chemical industries rose from 81.3% to 84.1%, the fourth straight quarterly increase. Pharmaceutical and drug product manufacturers and basic chemical manufacturers were the main contributors to the 3.4% increase in production in this industry.

For more information, contact Mychèle Gagnon (613-951-0994) or Richard Landry (613-951-2579), Investment and Capital Stock Division.

Manufacturers begin the year with strong performance

Manufacturers began the year with a strong performance, as January shipments rose 3.7% to $44.7 billion, new orders jumped 2.9% and inventories fell 0.2%. January's increase in shipments followed declines of 1.4% in November and 1.0% in December.

As a result of higher shipments and the decline in inventories in January, the inventory-to-shipment ratio tumbled to 1.41 from December's nine-month high of 1.47. The gradual rise of the inventory-to-shipment ratio during the latter months of 2002 was an indicator of slowing manufacturing activity, spurred by rising inventories.

A strong rebound by the motor vehicle and parts industries contributed to January's rise. But manufacturing activity remained healthy in other industries too. Excluding the motor vehicles and parts industries, shipments increased a robust 1.6% in January, following a 1.3% rise in December. Soaring prices boosted shipments of petroleum and coal products to a record high in January.

Production of both durable and non-durable goods was up strongly in January. And 13 of 21 industries, representing 72.5% of total shipments, posted increases in January.

Seven provinces and the territories reported higher shipments in January. A rebound in Ontario's motor vehicle industry contributed to a $1.3 billion (+5.7%) increase in the province's shipments. The petroleum and coal products industry contributed to a $157.3 billion (+4.4%) increase in Alberta's shipments. As well, shipments advanced $117.4 billion (+1.2%) in Quebec, partly because of a rebound in the province's primary metal industry.

On the downside, manufacturers reported a 3.3% decline in unfilled orders in January. The decrease was entirely concentrated in the aerospace products and parts industry, where unfilled orders have been down since October 2001. Excluding aerospace products and parts, unfilled orders increased 0.2%.

Manufacturers' shipments, January 2003
Seasonally adjusted

	$ millions	% change, previous month
Canada	**44,662**	**3.7**
Newfoundland and Labrador	211	9.1
Prince Edward Island	109	-3.4
Nova Scotia	781	5.0
New Brunswick	1,161	0.2
Quebec	10,244	1.2
Ontario	23,895	5.7
Manitoba	979	-2.9
Saskatchewan	627	2.3
Alberta	3,772	4.4
British Columbia	2,878	-0.4
Yukon, Northwest Territories and Nunavut	6	22.2

Factory employment regained some lost ground in February as payrolls increased by 21,000. Manufacturers had shed 24,700 jobs in December and 14,600 in January.

Strong output by the durable goods sector contributed to a 2.2% rise in US manufacturing shipments in January. Following a 0.6% decrease in December, US shipments were at the highest level since May 2001. Transportation equipment and computers, as well as petroleum and coal products, contributed to the solid boost this month.

US inventories remained stable in January, following a 0.6% rise in December. This was the largest monthly increase in manufacturers' stocks in two and a half years.

*The January 2003 issue of the **Monthly Survey of Manufacturing** (Internet: 31-001-XIB, $15/$147) will be available soon. For more information, contact Russell Kowaluk (613-951-0600; kowarus@statcan.ca), Manufacturing, Construction and Energy Division.* *(See also "Current trends" on page 7.)*

Productivity falls for first time in two years

Labour productivity in Canada's business sector declined for the first time in two years in the fourth quarter, as economic activity slowed and employment grew. Productivity fell 0.6% in the fourth quarter from the third, halting a series of eight consecutive quarterly increases.

Even so, for 2002 as a whole, Canadian businesses increased their productivity by 2.2%, on the strength of productivity gains in the first three quarters. This was more than twice the rate of annual growth of 0.8% during 2001, when economic activity was weak.

South of the border, labour productivity in the American business sector rose only a marginal 0.1% in the fourth quarter. However, for the year as a whole, productivity in the United States soared at 4.8%. This was the largest annual growth rate since 1950.

Last year was the third straight year in which annual productivity growth among American businesses exceeded that of their Canadian counterparts.

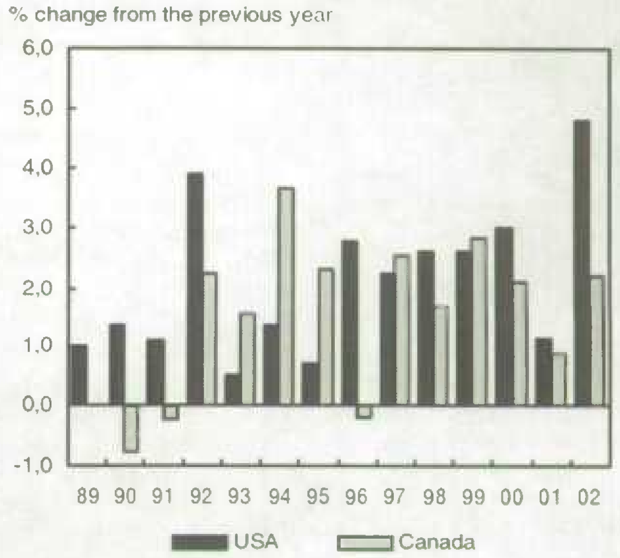
On a quarterly basis, labour productivity on both sides of the border felt the impact of a slowdown in economic activity in the fourth quarter. In the third quarter, production had increased 1.0% in Canada and 1.3% in the United States, but this slowed to 0.2% in Canada and to 0.4% in the United States in the fourth.

On an annual basis, the better productivity performance south of the border stemmed mainly from differences in labour market performance in 2002.

Canada has outpaced the United States for the last four years in terms of annual employment growth. In 2002, the number of hours worked declined 2.0% in the United States, but increased 1.5% in Canada.

Output growth from Canadian businesses has also surpassed that of their American counterparts in the last four years. Real gross domestic product (GDP) in the business sector increased 3.8% in Canada in 2002, compared with a 2.7% gain in the United States.

Productivity in the United States and Canada



Real GDP growth was stronger in Canada than in the United States in 2002. However, the decline in the number of hours worked in the United States was responsible for the much stronger growth in labour productivity south of the border.

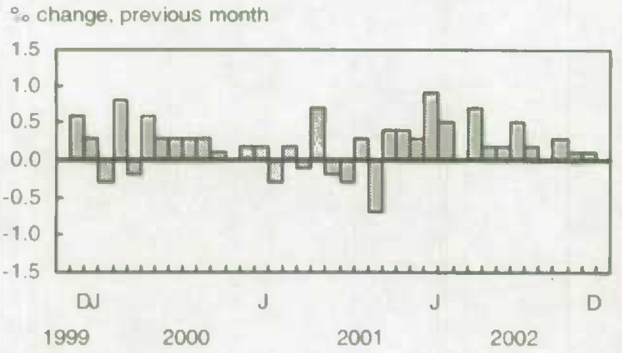
American businesses also developed a slight advantage over Canadian businesses in the evolution of labour costs. On an annual basis, unit labour costs increased 0.3% from 2001 in Canada, compared with a decline of 1.7% in the United States, as measured in their respective national currencies.

The unit labour cost gap between the two nations in 2002 was the result of a slower gain in labour productivity in Canada, since increases in hourly wages were virtually identical in both. Hourly wages rose 2.9% in the United States in 2002, compared with 2.6% in Canada.

For more information, contact Jean-Pierre Maynard (613-951-3654; fax: 613-951-5403; maynard@statcan.ca), Micro-Economic Analysis Division.

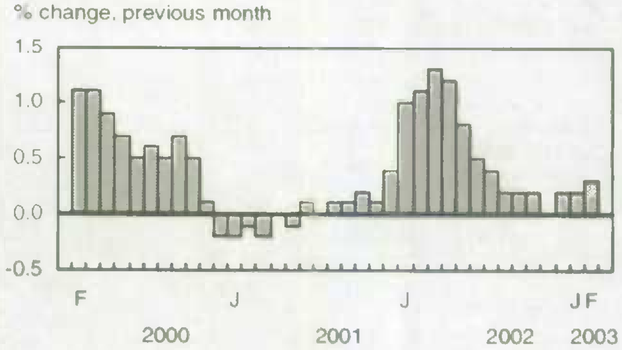
Current trends

Gross domestic product



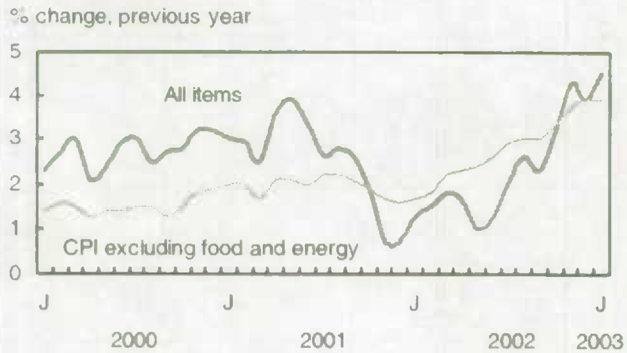
Total economic activity edged up 0.1% in December, the same as in November.

Composite Index



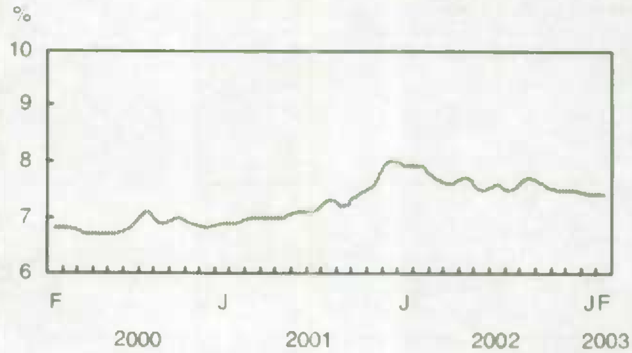
The leading indicator grew 0.3% in February after rising 0.2% in January.

Consumer Price Index



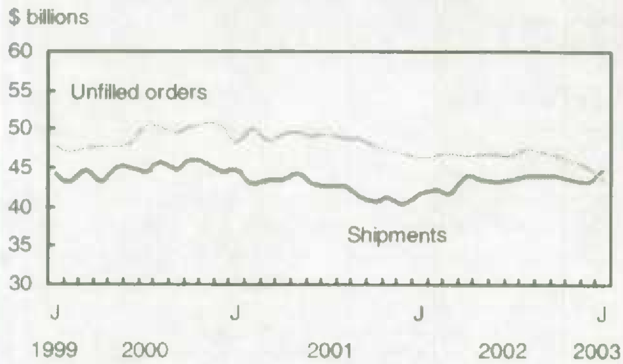
Consumer prices for goods and services were 4.5% higher in January than they were a year earlier. Excluding food and energy, prices rose 3.9%.

Unemployment rate



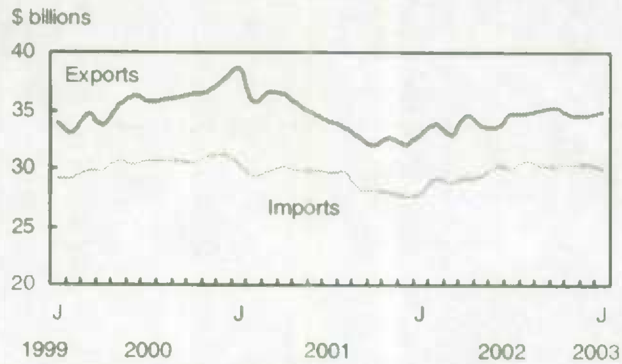
In February, the unemployment rate was unchanged at 7.4%.

Manufacturing



Manufacturers' shipments rose 3.7% in January to $44.7 billion. The backlog of unfilled orders declined 3.3% to $43.5 billion.

Merchandise trade



In January, the value of merchandise exports rose 1.3% to $35.0 billion. Imports fell 1.3% to $30.0 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 ($ billions, 1997)[1]	December	989.2	0.1%	3.8%
Composite Index (1992=100)	February*	180.6	0.3%	5.7%
Operating profits of enterprises ($ billions)	Q4 2002	41.9	5.1%	32.8%
Capacity utilization rate (%)[2]	Q4 2002	82.9	-0.2†	2.5†
DOMESTIC DEMAND				
Retail trade ($ billions)	December	25.9	0.2%	3.7%
New motor vehicle sales (thousands of units)	January	129.0	-14.1%	-11.8%
Wholesale trade ($ billions)	January*	36.8	1.8%	8.6%
LABOUR				
Employment (millions)	February	15.7	0.4%	3.4%
Unemployment rate (%)	February	7.4	0.0†	-0.4†
Participation rate (%)	February	67.5	0.2†	1.1†
Average weekly earnings ($)	December	685.42	0.21%	2.17%
Help-wanted Index (1996=100)	February	111.4	-0.2%	-11.5%
Regular Employment Insurance beneficiaries (in thousands)	December	547.8	-0.5%	-2.1%
INTERNATIONAL TRADE				
Merchandise exports ($ billions)	January	35.0	1.3%	6.3%
Merchandise imports ($ billions)	January	30.0	-1.3%	8.0%
Merchandise trade balance (all figures in $ billions)	January	4.9	0.8	-0.2
MANUFACTURING				
Shipments ($ billions)	January*	44.7	3.7%	6.9%
New orders ($ billions)	January*	43.1	2.9%	4.8%
Unfilled orders ($ billions)	January*	43.5	-3.3%	-5.8%
Inventory/shipments ratio	January*	1.41	-0.06	-0.08
PRICES				
Consumer Price Index (1992=100)	January	121.4	0.8%	4.5%
Industrial Product Price Index (1997=100)	January	108.4	0.3%	2.0%
Raw Materials Price Index (1997=100)	January	125.6	5.2%	22.2%
New Housing Price Index (1992=100)	January	113.1	0.3%	5.1%

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

* *new this week*

† *percentage point*

[1] *1997 replaces 1992 as the base year used in determining prices for gross domestic product by industry. Also, valuation has been changed from factor cost to basic prices.*

[2] *Calculation of the rates of capacity use is now based on the 1997 North American Industry Classification System (NAICS), which has replaced the 1980 Standard Industrial Classification.*

Infomat
A weekly review

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Products released from March 13 to 19, 2003

SUBJECT AREA Title of product	Period	Catalogue number	Price ($) (issue/subscription)
ANALYTICAL STUDIES			
Alternative work practices and quit rates: methodological issues and empirical evidence for Canada		11F0019MIE	free
BALANCE OF PAYMENTS AND FINANCIAL FLOWS			
Canada's balance of international payments	Q4 2002	67-001-XIB	29/93
Canada's balance of international payments	Q4 2002	67-001-XPB	38/124
BUSINESS REGISTER			
Canadian Business Patterns	December 2002	61F0040XCB	various prices
CULTURE, TOURISM AND THE CENTRE FOR EDUCATION STATISTICS			
International travel, advance information	January 2003	66-001-PIE	6/55
DISTRIBUTIVE TRADES			
New motor vehicle sales	January 2003	63-007-XIB	13/124
ENVIRONMENT ACCOUNTS AND STATISTICS PROGRAM			
Waste Management Industry Survey: Business and government sectors	2000	16F0023XIE	free
HOUSING, FAMILY AND SOCIAL STATISTICS			
Canadian social trends	Spring 2003	11-008-XIE	8/27
Canadian social trends	Spring 2003	11-008-XPE	11/36
INTERNATIONAL TRADE			
Canadian international merchandise trade	January 2003	65-001-XIB	14/141
Exports by country	2002	65-003-XMB	62/206
Exports by country	2002	65-003-XPB	124/412
MANUFACTURING, CONSTRUCTION AND ENERGY			
Industrial chemicals and synthetic resins	January 2003	46-002-XIE	5/47)
Natural gas transportation and distribution	June 2002	55-002-XIB	13/125
Production and shipments of steel pipe and tubing	January 2003	41-011-XIB	5/47
Refined petroleum products	October 2002	45-004-XIB	16/155
Steel wire and specified wire products	January 2003	41-006-XIB	5/47
PRICES			
Different perspectives on the rate of inflation, 1982-2000: The impact of homeownership costs		62F0014MIE	free
SCIENCE, INNOVATION AND ELECTRONIC INFORMATION			
A Profile of employment in computer and telecommunications industries		56F0004MIE	free
Science statistics, Vol. 27, no. 3		88-001-XIB	6/59
Scientific and technological activities of provincial governments, 1993-1994 to 2001-2002		88F0006XIE	free
SERVICE INDUSTRIES			
Consumer demand for entertainment services, no. 42		63F0002XIB	free
Consumer demand for entertainment services, no. 42		63F0002XPB	10/35
TRANSPORTATION			
Aircraft movement statistics	January 2003	51F0001PIE	free

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