



Infommat

A Weekly Review

Friday, July 18, 2003

INSIDE

◆ Exports slow down in the wake of low energy prices

Merchandise exports plunged to their lowest level in 19 months in May, as energy prices continued to fall and the agricultural industry reeled from mad cow disease.

◆ Truck sales lead as new motor vehicle market rises

The number of new motor vehicles sold in May rebounded 8.4%, making up almost all the losses registered in April and March. Truck sales rose 11.4% from their April level, compared with 5.9% for car sales.

◆ Wholesalers' operating profits slid in 2001

Wholesale operating profits and gross margins fell in 2001, as the sector struggled with a generally weak economic environment both at home and abroad. Operating profits across all trade groups slid 6.4%.

◆ Family violence a growing phenomenon

One-quarter of all violent crimes reported to a sample of police services in 2001 involved cases of family violence. There were 344 incidents for every 100,000 women aged 15 and older compared with 302 in 1995.

Unemployment rate down a notch as economy adds jobs

Canada's unemployment rate edged down in June as the economy gained 49,000 jobs, although almost all of them were part-time.

The unemployment rate eased to 7.7% in June from 7.8% in May. June's gain in jobs halted two straight months of slight declines.

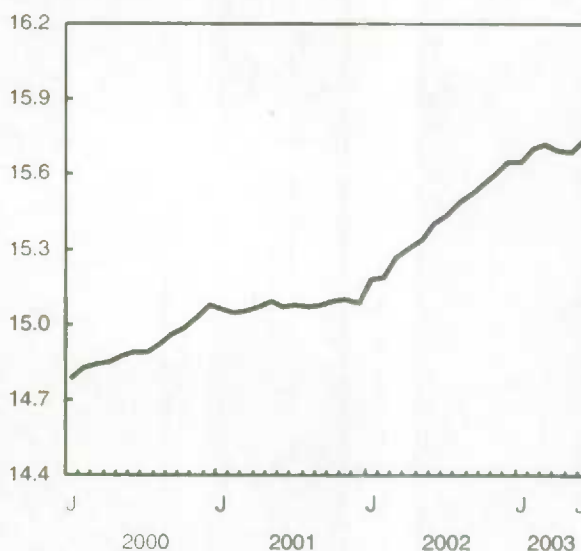
So far this year, employment in Canada is up just 0.5%, or about 84,000 jobs. Even so, this outperforms the United States, where employment declined 0.2% over the same period.

After four months of robust gains, full-time employment growth in Canada has stalled in the past two months. In addition, manufacturing employment slipped in June, continuing a trend that has been under way since late last year.

(continued on page 2)

Employment

Millions, seasonally adjusted



Statistics
Canada

Statistique
Canada

Canada

Unemployment rate down... (continued from page 1)

The manufacturing sector lost 23,000 jobs in June. The losses were concentrated mainly in food processing in Ontario and clothing production in Quebec. The decline left employment in the manufacturing sector about 3.7%, or 89,000 jobs, below the level in November 2002.

On the other hand, employment rose in June in a number of service-producing industries, especially transportation and public administration.

The transportation and warehousing sector gained 13,000 jobs, offsetting a loss in May. Much of the increase occurred in the truck transportation industry. Despite the gain, transportation and warehousing employment was down 25,000, or 3.2% from the most recent peak in September 2002.

Employment in public administration continued the upward trend that began in 2002, rising by 12,000 in June. Since the start of 2003, the sector has gained 32,000 jobs, a 4.0% increase. The federal government has accounted for most of the gain.

Following five months of virtually no job growth, employment among adult women jumped by 29,000 in June, mostly in full-time work. These gains pushed their unemployment rate down from 6.6% to 6.3%.

In June, employment among adult men edged up 16,000, all in part-time work. This partly offset the sharp decline observed in May and left employment among adult men up only 46,000 (+0.6%) since the start of 2003. Their unemployment rate edged down from 6.7% to 6.6% in June.

For a second consecutive month, part-time employment rose among young people, while full-time employment declined. This left overall youth employment virtually unchanged in June.

Although youth employment growth has been weak so far in 2003, young people continue to enter the labour market. This has pushed their unemployment rate from 13.3% at the start of the year to 13.9% in June.

Labour Force Survey, June 2003 Seasonally adjusted¹

| | Labour force | | Employment | | Unemployment | |
|---------------------------|-----------------|--------------------------|-----------------|--------------------------|----------------|------------|
| | '000 | % change, previous month | '000 | % change, previous month | '000 | rate (%) |
| Canada | 17,042.5 | 0.1 | 15,733.9 | 0.3 | 1,308.6 | 7.7 |
| Newfoundland and Labrador | 257.8 | -1.4 | 218.2 | -0.1 | 39.7 | 15.4 |
| Prince Edward Island | 77.8 | 0.8 | 70.3 | 3.7 | 7.5 | 9.6 |
| Nova Scotia | 481.6 | 0.5 | 439.3 | 0.6 | 42.3 | 8.8 |
| New Brunswick | 384.4 | 0.3 | 343.7 | 1.8 | 40.7 | 10.6 |
| Quebec | 4,003.3 | -0.2 | 3,647.8 | 0.3 | 355.5 | 8.9 |
| Ontario | 6,720.8 | 0.5 | 6,226.8 | 0.3 | 493.9 | 7.3 |
| Manitoba | 596.9 | -0.3 | 569.5 | -0.4 | 27.4 | 4.6 |
| Saskatchewan | 516.4 | 0.0 | 488.7 | 0.1 | 27.6 | 5.3 |
| Alberta | 1,815.9 | 0.1 | 1,722.9 | 0.6 | 92.9 | 5.1 |
| British Columbia | 2,187.7 | -0.3 | 2,006.6 | 0.1 | 181.1 | 8.3 |

¹ Data are for both sexes aged 15 and over.

After a two-month pause, employment in Ontario increased by 17,000 in June, entirely in part-time work. As a result of strength in the first quarter, employment in Ontario has increased 61,000 (+1.0%) since the start of 2003, with two-thirds of the gains in part-time jobs. Despite the job growth in June, Ontario's unemployment rate went from 7.1% to 7.3%, as large numbers of adults entered the labour force.

In June, gains were made in Toronto in the two industries that had appeared to be most affected by SARS: accommodation and food, and health care and social assistance.

Employment in Quebec rose slightly (+10,000) in June, mainly among youth. The small increase in employment, together with a decrease in the number of persons looking for work, caused the unemployment rate to decline from 9.3% to 8.9%. Gains in a number of industries offset losses in manufacturing and trade.

For more information, contact Geoff Bowlby (613-951-3325), Labour Force Survey. (See also "Current trends" on page 7.)

Exports slow down in the wake of low energy prices

Merchandise exports plunged to their lowest level in 19 months in May, as energy prices continued to fall and the agricultural industry reeled from mad cow disease.

Companies exported goods worth just over \$32.6 billion, down 2.8% from April and the lowest level since October 2001.

Exports fell in all major categories except automotive products, which remained flat. Hardest hit were exports of agricultural and fishing products, which declined 9.1%, and energy products, which were down 7.0%. A drop in natural gas exports accounted for one-third of the decline in total exports.

At the same time, companies imported \$28.6 billion in goods, a 1.1% decline from April and the lowest level since the start of 2002. Though the value of imports declined, companies actually imported a higher volume of goods, owing to the increased purchasing power of the stronger Canadian dollar.

As a result, Canada's trade surplus with the rest of the world fell from \$4.6 billion in April to just under \$4.0 billion in May.

Exports to the United States, which accounted for 83% of the total, fell 2.8% to \$27.1 billion, while imports from the United States fell 1.5% to \$20.1 billion.

Exports to other countries fell 2.9% to \$5.5 billion. The largest declines came from exports to Japan, which fell 23.4% to \$686 million. On the other hand, exports to the European Union increased 11.0% to \$2.1 billion.

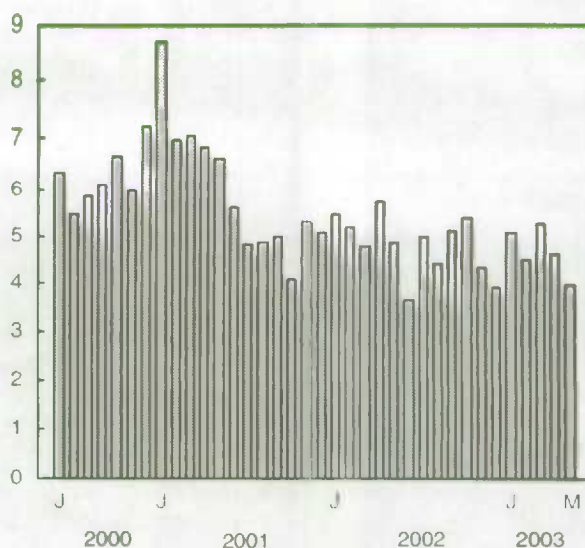
Exports of energy products tumbled 7.0% to just over \$4.9 billion in May, natural gas exports to the United States declining 13.1%.

Companies exported just under \$2.3 billion worth of agriculture and fishing products in May, a drop of \$227 million from April. This decline occurred after the United States and other nations closed their borders to Canadian meat products and live animals following the discovery of a single case of bovine spongiform encephalopathy (BSE) in Alberta on the 20th of May. This ban contributed to a 25% decline in exports of meat and live animals.

In the largest sector, machinery and equipment, companies exported \$7.6 billion (-0.6%) in goods. Exports of aircraft, engines and parts, as well as exports of industrial machinery increased substantially. However, these gains were overshadowed by declines in all other machinery and equipment sub-sectors.

Trade balance

\$ billions



Exports of forestry products fell 2.7% to \$2.7 billion, as paper exports declined 5.1% to \$968 million, and wood products fell 6.0% to just over half a billion dollars. Offsetting these declines, lumber and sawmill products rose 1.1% to \$1.2 billion.

Imports in Canada's largest import sector, machinery and equipment, decreased 3.9% to \$7.9 billion, the lowest level since September 1999.

Imports of aircraft and other transportation equipment fell 13.5% to \$784 million. Imports of aircraft, engines and parts plummeted 32.6% to just over \$384 million, their lowest level since July 1996.

Imports of consumer goods, such as pharmaceuticals, televisions and apparel, also fell 2.7% to \$3.9 billion.

In contrast, imports of automotive products increased 1.5% to \$6.7 billion in May. Imports of passenger autos reversed the previous month's decline with a 4.8% gain to \$2.3 billion.

The May 2003 issue of Canadian international merchandise trade (Internet: 65-001-XIB, \$14/\$141) will be available soon. For more information, contact Jocelyne Elibani, (1-800-294-5583; 613-951-9647). (See also "Current trends" on page 7.)

Truck sales lead as new motor vehicle market rises

The number of new motor vehicles sold in May rebounded 8.4%, making up almost all the losses registered in April and March.

In all, 144,282 new vehicles rolled off dealers' lots in May, 11,214 more units than in April. Of these additional vehicles sold, three in five were trucks.

Despite May's increase, the number of new motor vehicles sold in the first five months of 2003 was down 4.3% from the same period of 2002, a record year.

With the gain recorded in May, the downward movement of new vehicle sales in recent months appears to have slowed. However, on the basis of preliminary figures from the auto industry, it is estimated that the number of new motor vehicles sold in June fell by about 10%, which could reinforce the downward movement.

In May, vehicle dealers saw their truck sales grow at almost twice the rate for passenger cars. Truck sales rebounded 11.4% from their April level, compared with 5.9% for car sales.

After declines in the past two months, new truck sales rose to 67,964 vehicles in May. This is the largest number of new trucks sold during a month so far in 2003. The increase more than offset the April and March declines combined.

Despite May's gain, new truck sales have been maintaining a downward movement in recent months.

In May, sales of new passenger cars advanced 5.9% from April to 76,318 units. This increase, which followed two successive monthly declines, was almost entirely attributable to sales of North American-built cars, which rebounded 8.3%.

Sales of overseas-built passenger cars were almost unchanged in May. They advanced 0.3% from April, after three months of consecutive declines.

In recent years, sales of North American-built passenger cars have been generally stable. However, they have fluctuated more than sales of overseas-built cars, which have shown a downward movement in recent months.

In May, the number of new motor vehicles sold advanced in all provinces, following two consecutive declines in April and March. Only Newfoundland and Labrador reported a gain in April.

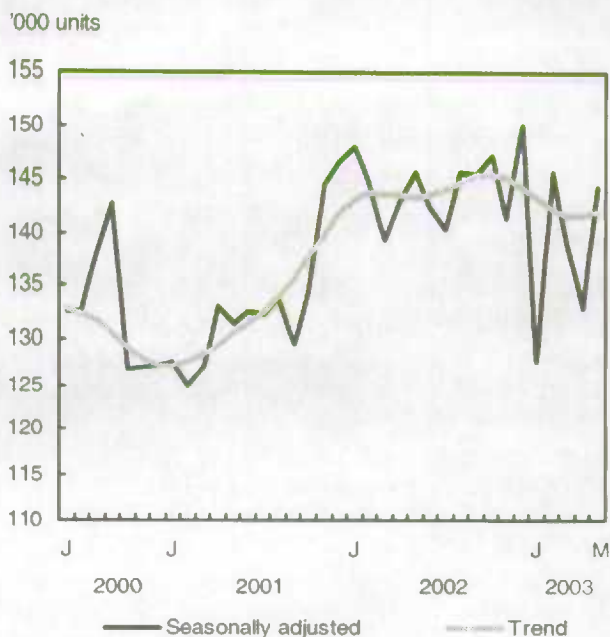
Prince Edward Island, Saskatchewan, Ontario and New Brunswick posted the largest gains, each advancing at least 10%

Note to readers

Passenger cars include those used for personal and commercial purposes, such as taxis or rental cars. Trucks include minivans, sport-utility vehicles, light and heavy trucks, vans and buses.

North American-built new motor vehicles include vehicles manufactured or assembled in Canada, the United States or Mexico. All other new motor vehicles are considered to have been manufactured overseas.

New motor vehicle sales



from April. In New Brunswick, the movement of sales appears to have stabilized in recent months, after a downward movement that began in the spring of 2002.

In the other provinces, the rebound of sales in May allowed them to offset all or much of the losses recorded in April and March.

The May 2003 issue of *New motor vehicle sales* (Internet: 63-007-XIB, \$13/\$124) is now available. For general information or to order data, contact Client Services (1-877-421-3067; 613-951-3549; retailinfo@statcan.ca).

Wholesalers' operating profits slid in 2001

Wholesale operating profits and gross margins fell in 2001, as the sector struggled with a generally weak economic environment both at home and abroad.

Total operating revenues, which had been growing at near double-digit rates over the previous two years, edged up 1.6% to \$478.3 billion dollars.

After enjoying several years of robust growth, the Canadian economy cooled off in 2001. Gross domestic product rose 1.9%, its smallest gain since 1992. Lower business investment, falling corporate profits and weaker consumer spending all contributed to the slowdown. Wholesalers also had to contend with the weakening of their major external market, the United-States.

Wholesalers cut back on hiring, shedding 25,600 jobs in 2001, a 3.5% decrease. Wholesale employment's share of total Canadian employment fell from 5.8% in 2000 to 5.5% in 2001.

Operating profits across all trade groups slid 6.4% in 2001 to \$24.6 billion dollars.

Wholesalers of computers and electronic products bore the brunt of the downturn, as their operating profits tumbled 29.7% to \$2.2 billion dollars. Total operating revenues for the sector dropped 7.5% to \$31.1 billion dollars.

Other sectors recording major declines in operating profits were farm products (-20.6%), motor vehicle parts and accessories (-20.5%) and building supplies (-18.0%).

On a more positive note, wholesalers of pharmaceutical products continued to flourish, as operating profits climbed 21.6% on the back of a 16.2% increase in total operating revenue.

The food products sector's operating profits increased 11.3% to \$3.1 billion, while wholesalers of apparel recovered from a poor 2000 to record a 17.3% increase in operating profits.

Among all trade groups, gross margins as a percentage of total operating revenue declined from 19.6% in 2000 to 19.0% in 2001. This marked the second year in a row that gross margins fell. Once again the biggest drop came in the computer and electronics sector, where margins fell from 28.2% in 2000 to 24.3%.

Revenues were up in 13 of the 17 trade groups. Four of the 17 wholesale trade groups accounted for close to 50% of total operating revenues and 33% of gross margins in 2001.

Food overtook motor vehicles to become the largest wholesale sector in 2001 with a 13.9% share of total operating revenues, slightly ahead of the latter's 13.5%. The two other sectors with significant shares were petroleum products (11.0%) and "other products" (9.8%).

Operating revenues advanced in 10 of the 13 provinces and territories in 2001. The strongest growth came in the North. Saskatchewan, Prince Edward Island, Quebec, New Brunswick and Ontario also recorded increases above the national average of 1.6%. The biggest decline came in Alberta (-2.0%) where the decline in the petroleum sector was a major contributing factor.

Three provinces accounting for almost 80% of both total operating revenues and gross margins: Ontario (43.5%), Quebec (19.7%) and Alberta (16.0%).

For general information, contact Client Services (1-877-421-3067; 613-951-3549; wholesaleinfo@statcan.ca). For further analytical information, contact Catherine Mamay (613-951-9683; catherine.mamay@statcan.ca), Distributive Trades Division.

Smoking patterns in the 20th century

The current issue of *...au courant*, an electronic newsletter published by the Health Analysis and Measurement Group, contains an article examining smoking patterns over the last several decades.

The analysis finds that while many patterns in smoking behaviour have changed over the years, one pattern has remained constant: smokers tend to smoke the most during their middle years.

In 1998, fewer than one in three smokers aged 15 to 39 smoked more than 20 cigarettes a day. By ages 45 to 49, that proportion increased to almost half, then dropped back to one in three by age 70.

Recent surveys also suggest smokers are using fewer cigarettes a day. Between 1977 and 2000, the proportion of smokers using 15 cigarettes or less a day grew from 43% to 62% while the proportion smoking more than 25 a day dropped from 11% to 5%.

The article "How times have changed! Canadian smoking patterns in the 20th century," is available now in the June 2003 edition of *...au courant*. (Internet: 82-005-XIE, free). For more information, contact Jean-Marie Berthelot (951-3760; jean-marie.berthelot@statcan.ca), Health Analysis and Measurement Group.

Family violence a growing phenomenon

One-quarter of all violent crimes reported to a sample of police services in 2001 involved cases of family violence, according to the sixth annual edition of *Family violence in Canada: A statistical profile*.

Two-thirds of these cases were violence committed by a spouse or an ex-spouse, and 85% of the victims were women.

From 1995 to 2001, the rate of incidents of spousal violence reported by police increased. At the same time, victimization surveys suggest that victims may be more willing to report these experiences to police.

Rates of spousal violence reported to the police fluctuated between 1995 and 2001, but increased overall for both sexes. However, rates were much lower for men.

The seriousness of family violence, and its consequences to women and their children, have mobilized community groups and governments to undertake actions and strategies aimed at reducing violence within the family.

One vital part of the overall response is the shelter system for abused women and children. From 1992 to 2002, the number of shelters rose from 376 to 524. Despite this increase, however, there are not enough shelters to accommodate the daily influx of women and children seeking asylum.

In 2001, there were 344 incidents for every 100,000 women aged 15 and older in the population, compared with 302 in 1995. For men, there were 62 incidents for every 100,000 men in the population, up from only 37 six years earlier.

Physical force was used more often in incidents involving women (72%) than in those involving men (64%). Threats were the most serious form of violence in 14% of cases reported to police in 2001, and they were used more often against female victims than against males. However, weapons were used more frequently in incidents against men (21%) than in those against women (9%).

The most frequent charge in episodes of spousal violence was common assault. Police laid charges in 80% of spousal violence cases. In cases involving female victims, charges were laid 81% of the time, and in cases involving men, 69% of the time.

Annual admissions to shelters by province and territory, 2001/02

| | *Admissions | | |
|-----------------------|----------------|---------------|---------------|
| | Total | Women | Children |
| Canada | 101,248 | 55,901 | 45,347 |
| Newfoundland | 1,162 | 693 | 469 |
| Prince Edward Island | 232 | 113 | 119 |
| Nova Scotia | 1,897 | 1,117 | 780 |
| New Brunswick | 2,131 | 1,224 | 907 |
| Quebec | 21,148 | 14,379 | 6,769 |
| Ontario | 34,588 | 18,066 | 16,522 |
| Manitoba | 6,565 | 2,911 | 3,654 |
| Saskatchewan | 4,572 | 2,088 | 2,484 |
| Alberta | 10,642 | 5,086 | 5,556 |
| British Columbia | 15,909 | 9,168 | 6,741 |
| Yukon | 754 | 417 | 337 |
| Northwest Territories | 1,030 | 397 | 633 |
| Nunavut | 618 | 242 | 376 |

* A person may be admitted more than once during the reporting period.

In 2001, there were 7,610 incidents of criminal harassment reported to police, involving 5,258 accused and 8,023 victims.

In 2001, 53% of female victims of stalking and 26% of male victims were stalked by a spouse or a dating partner. Charges were laid in 57% of stalking cases involving female victims, compared with 39% of cases with male victims.

In 2001, seniors aged 65 and over were the age group least likely to be victims of violent crime. The police-reported rate of violent crimes against seniors was 157 for every 100,000 people. This was 14 times lower than the rate for young people aged 18 to 24, the age group with the highest rate of victimization.

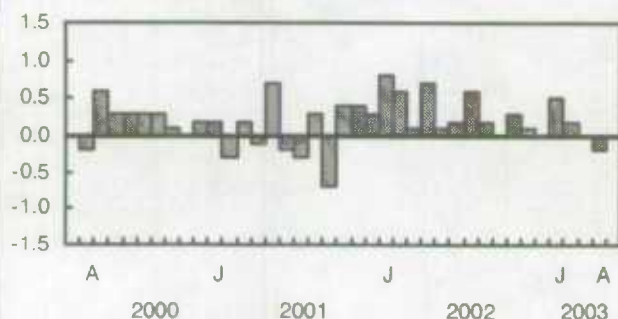
Men were the perpetrators of family-related violence against seniors in 82% of all cases in 2001. Over one-third of older female victims were assaulted by a spouse and one-third by an adult child.

The 2003 edition of *Family violence in Canada: A statistical profile* (Internet: 85-224-XIE, free) is now available on Statistics Canada's website (www.statcan.ca). For more information, contact Client Services (1-800-387-2231; 613-951-9023), Canadian Centre for Justice Statistics.

Current trends

Gross domestic product

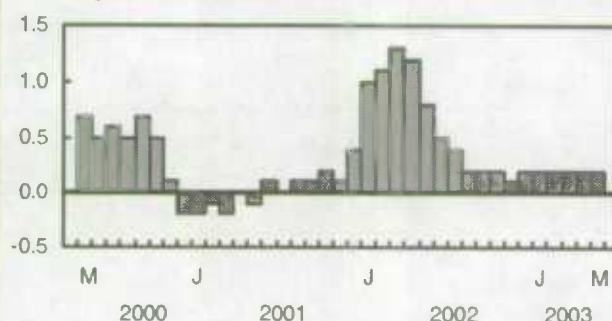
% change, previous month



Total economic activity dropped 0.2% in April, after remaining unchanged in March.

Composite Index

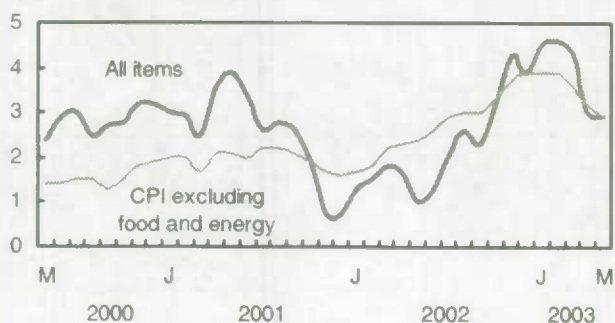
% change, previous month



The leading indicator grew 0.2% in May after rising 0.2% in April.

Consumer Price Index

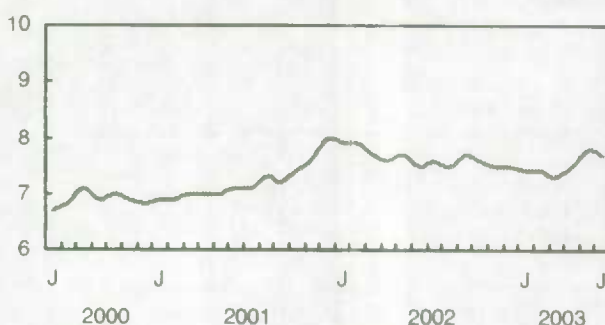
% change, previous year



Consumer prices for goods and services were 2.9% higher in May than they were a year earlier. Excluding food and energy, prices also rose 2.9%.

Unemployment rate

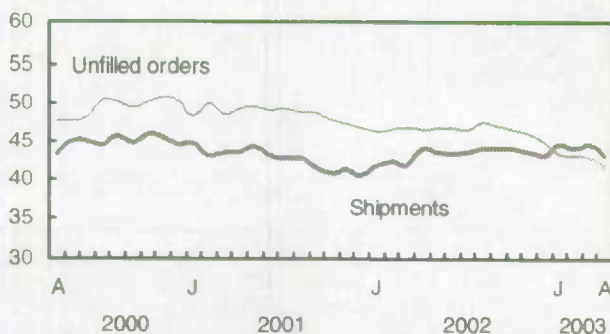
%



In June, the unemployment rate fell 0.1 percentage points to 7.7%.

Manufacturing

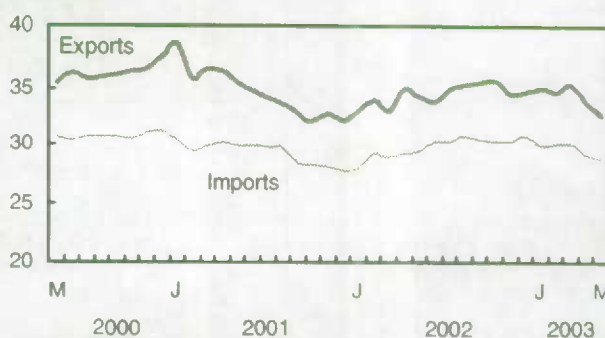
\$ billions



Manufacturers' shipments fell 3.4% in April to \$43.0 billion. The backlog of unfilled orders declined 1.9% to \$41.8 billion.

Merchandise trade

\$ billions



In May, the value of merchandise exports dropped 2.8% to \$32.6 billion. Imports fell 1.1% to \$28.6 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 | April | 991.3 | -0.2% | 1.8% |
| Composite Index (1992=100) | May | 181.5 | 0.2% | 2.8% |
| Operating profits of enterprises (\$ billions) | Q1 2003 | 42.9 | 10.6% | 26.6% |
| Capacity utilization rate (%) ² | Q1 2003 | 82.8 | 0.3† | 1.2† |
| DOMESTIC DEMAND | | | | |
| Retail trade (\$ billions) | April | 26.1 | -0.9% | 2.2% |
| New motor vehicle sales (thousands of units) | May* | 144.3 | 8.4% | -0.9% |
| Wholesale trade (\$ billions) | April | 35.9 | -1.1% | 3.2% |
| LABOUR | | | | |
| Employment (millions) | June* | 15.7 | 0.3% | 2.2% |
| Unemployment rate (%) | June* | 7.7 | -0.1† | 0.2† |
| Participation rate (%) | June* | 67.5 | 0.0† | 0.7† |
| Average weekly earnings (\$) | April | 687.17 | 0.1% | 1.3% |
| Regular Employment Insurance beneficiaries (in thousands) | April | 543.4 | 1.3% | 1.2% |
| INTERNATIONAL TRADE | | | | |
| Merchandise exports (\$ billions) | May* | 32.6 | -2.8% | -4.5% |
| Merchandise imports (\$ billions) | May* | 28.6 | -1.1% | -2.3% |
| Merchandise trade balance (all figures in \$ billions) | May* | 4.0 | -0.6 | -0.9 |
| MANUFACTURING | | | | |
| Shipments (\$ billions) | May* | 42.4 | -0.8% | -2.2% |
| New orders (\$ billions) | May* | 41.0 | -2.5% | -5.7% |
| Unfilled orders (\$ billions) | May* | 40.5 | -3.4% | -13.3% |
| Inventory/shipments ratio | May* | 1.49 | 0.00 | 0.07 |
| PRICES | | | | |
| Consumer Price Index (1992=100) | May | 122.0 | 0.1% | 2.9% |
| Industrial Product Price Index (1997=100) | May | 105.2 | -2.0% | -1.7% |
| Raw Materials Price Index (1997=100) | May | 113.0 | -2.5% | -0.5% |
| New Housing Price Index (1992=100) | April | 114.3 | 0.4% | 4.5% |

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 July 10 to 16, 2003

| SUBJECT AREA Title of product | Period | Catalogue number | Price (\$) (issue/subscription) |
|---|--|--|--------------------------------------|
| DISTRIBUTIVE TRADES New motor vehicle sales | May 2003 | 63-007-XIB | 13/124 |
| GEOGRAPHY Geography working paper series: Preliminary 2006 census metropolitan areas and census agglomerations delineations, no. 2 | | 92F0138MIE2003002 | free |
| HEALTH STATISTICS ...au courant | June 2003 | 82-005-XIE | free |
| INTERNATIONAL TRADE A profile of Canadian exporters | 1993-2001 | 65-506-XIE | 25 |
| INVESTMENT AND CAPITAL STOCK Building permits | May 2003 | 64-001-XIE | 14/145 |
| LABOUR AND HOUSEHOLD SURVEYS ANALYSIS Employment, earnings and hours Labour force information | April 2003 June 10-17, 2003 | 72-002-XIB 71-001-XIE | 24/240 8/78 |
| MANUFACTURING, CONSTRUCTION AND ENERGY Asphalt roofing Cement Construction type plywood Industrial chemicals and synthetic resins Steel wire and specified wire products | May 2003 May 2003 April 2003 May 2003 May 2003 | 45-001-XIB 44-001-XIB 35-001-XIB 46-002-XIE 41-006-XIB | 5/47 5/47 5/47 5/47 5/47 |
| MICRO ECONOMIC STUDIES AND ANALYSIS Update on economic analysis | | 11-623-XIE | free |
| SERVICE INDUSTRIES Analytical paper series - Service Industries Division: Struggling to remain competitive: A study of factors impeding growth for Canadian Internet service providers, vol. 44 | | 63F0002XIE2003044 | free |

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