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The Daily

Statistics Canada

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MAJOR RELEASES

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PUBLICATIONS RELEASED

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MAJOR RELEASES

Quarterly Business Conditions Survey, Canadian Manufacturing Industries

July 1991

Seasonally Adjusted

Canadian manufacturers' opinions concerning the expected volume of production in the upcoming quarter, orders received and for finished products inventories all improved between the April 1991 and July 1991 surveys. However, the level of concern about the backlog of unfilled orders remained high.

Highlights

- Canadian manufacturers were optimistic about the **expected volume of production** over the next three months. The July 1991 balance of opinion stood at +2, up 14 points from the previous quarter. The balance of opinion had been negative during the last four quarters.

The balance of +2 in July is calculated by subtracting the pessimistic 23% indicating "lower than normal" volume of expected production from the optimistic 25% reporting "higher than normal" volume of expected production.

- Although it remained negative, the July 1991 balance of opinion of -14 for **orders received** was a significant improvement compared to the -40 posted in April. These levels are similar to the -42 and -16 figures registered for the last quarter of 1982 and the first quarter of 1983, respectively. The increase was caused mainly by the following industries: transportation equipment, electrical and electronic products, paper and allied products, and chemicals and chemical products.

- The balance of opinion for the **backlog of unfilled orders** improved by four points in July 1991 (-54 compared to -58 in April 1991). The balance for unfilled orders has remained negative since the second quarter of 1989.

Unfilled orders are the stock of orders which will generate future shipments, assuming that orders are not cancelled.

- The July 1991 balance of opinion for **finished products inventories** gained 13 points. It went from a level of -38 in April 1991 to -25 for this quarter. This represents the greatest quarter-to-quarter improvement since a 15-point increase between the first and second quarters of 1983 (from -32 for January 1983 to -17 for April 1983).

> ***Note to Users***
>
> *Individual responses to the Business Conditions Survey are weighted by the value of the respondent's shipments reported to the annual Survey of Manufactures. The proportions, therefore, reflect the magnitude of the individual manufacturer's contribution to the total. The balance is the difference between the proportion associated with the positive-type response (e.g., higher volume of production) and the proportion related to the negative-type response (e.g., lower volume of production). Both the raw data (raw) and seasonally adjusted (s.a.) data are given for the balance. The seasonally adjusted value for the neutral components (e.g., expected production about the same) is calculated by subtracting the sum of the seasonally adjusted values of the other two components from 100.*

Unadjusted

- About 75% of manufacturers did not report any particular production difficulties in the latest survey. Some 8% reported a shortage of working capital impeded their level of production. Another 9% reported having "other" sources of production difficulties. A review of respondents' comments in the "other" category still shows that a majority indicated "lack of orders" and "weak markets" as the main sources of production difficulties. For the third consecutive quarter, "skilled labour shortage" stood at 4%.

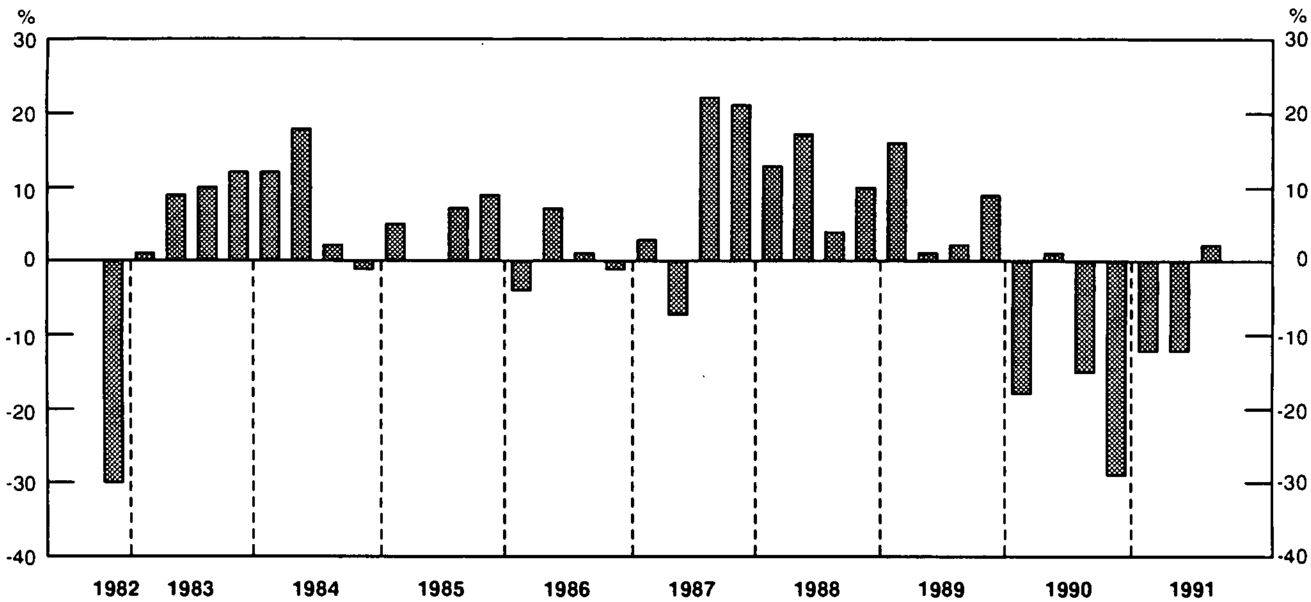
The Business Conditions Survey is carried out in January, April, July and October with the majority of responses recorded in the first two weeks of these months. Results are based on replies from about 5,000 manufacturers.

Note that survey weights and sampled units have been benchmarked to the 1987 Annual Survey of Manufactures (ASM) and data back to 1987 have been revised accordingly. In general, trends for the revised data have remained the same as those prior to the benchmarking to the 1987 ASM.

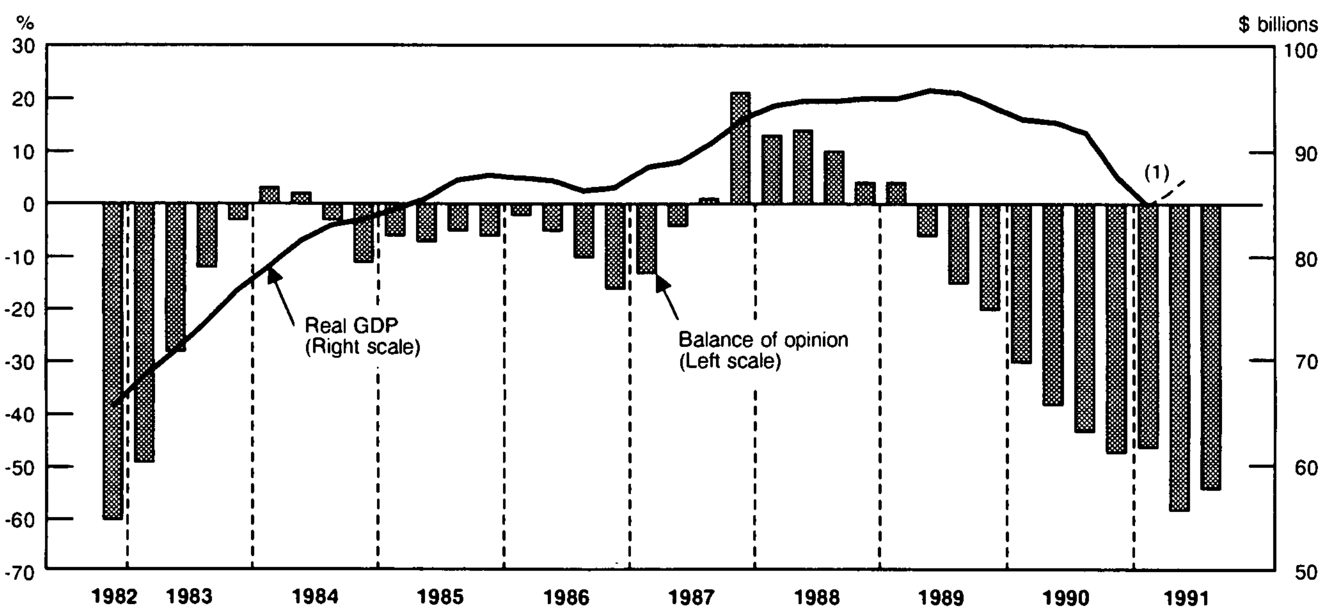
Available on CANSIM (raw data only): matrices 2843-2845.

For further information, contact C. Robillard (613-951-3507), Monthly Survey of Manufacturing Section, Industry Division. □

Balance of Opinion for Expected Volume of Production
Next Three Months vs Last Three Months



Balance of Opinion on Backlog of Unfilled Orders
and Real GDP for Manufacturing Industries
Seasonally adjusted



(1) ----- April and May 1991

Business Conditions Survey, Canadian Manufacturing Industries

July 1991

All Manufacturing Industries	July 1990	Oct. 1990	Jan. 1991	Apr. 1991	July 1991
Volume of production during next three months compared with last three months will be:			**Seasonally Adjusted**		
About the same	43	45	42	40	52
Higher	21	13	23	24	25
Lower	36	42	35	36	23
Balance	-15	-29	-12	-12	2
			Raw		
Balance	-31	-25	-21	7	-14
Orders received are:			**Seasonally Adjusted**		
About the same	41	37	38	44	62
Rising	12	9	10	8	12
Declining	47	54	52	48	26
Balance	-35	-45	-42	-40	-14
			Raw		
Balance	-35	-48	-43	-36	-13
Present backlog of unfilled orders is:			**Seasonally Adjusted**		
About normal	45	41	42	36	40
Higher than normal	6	5	6	3	3
Lower than normal	49	54	52	61	57
Balance	-43	-49	-46	-58	-54
			Raw		
Balance	-39	-47	-47	-61	-51
Finished product inventory on hand is:			**Seasonally Adjusted**		
About right	63	63	53	56	69
Too low	4	6	5	3	3
Too high[1]	33	31	42	41	28
Balance	-29	-25	-37	-38	-25
			Raw		
Balance	-28	-24	-38	-39	-25
Sources of production difficulties:					
			Raw		
Working capital shortage	5	5	5	9	8
Skilled labour shortage	7	7	4	4	4
Unskilled labour shortage	1	1	0	0	0
Raw material shortage	4	4	4	2	3
Other difficulties	5	9	13	9	9
No difficulties	78	74	73	75	75

[1] *No evident seasonality.*

■

Farm Input Price Index

Second Quarter 1991

The Farm Input Price Index (1986 = 100) for the second quarter of 1991 stood at a preliminary level of 110.0, down 1.5 % from the previous quarter and a decline of 0.2% from a year earlier. Of the seven major groups which are updated quarterly, four indexes declined from the first quarter, while three rose.

- The largest impact on the total Farm Input Price Index came from the interest index, declining by 7.3% as the non-mortgage component was down by 10.1%.
- The crop production index declined by 4.4% as prices of seed were 4.6% lower than in the first quarter and the crop insurance index (updated annually in the second quarter) decreased sharply (-35.3%). Prices of fertilizer and pesticides rose 0.6% and 2.4%, respectively.
- The machinery and motor vehicles index was down by 2.0% in the quarter. All the components of this major group recorded a decline: machinery replacement (-0.4%), motor vehicles replacement (-0.7%) and machinery and motor vehicles operation (-3.5%). Petroleum product prices, a part of the operation component, decreased by 7.5%.
- The animal production index was up 1.0% due to higher prices for feeder cattle (3.4%) and feed (0.4%); feed prices, however, were still 4.6% lower than a year ago. Declines in prices were recorded for weanling pigs (-3.5%) and chicks (-5.7%).

Available on CANSIM: matrices 2010-2019.

The second quarter 1991 issue of *Farm Input Price Indexes* (62-004, $12.25/$49) will be available at the end of August. See "How to Order Publications".

For more detailed information on this release, contact the Information and Current Analysis Unit (613-951-9607), Prices Division. □

Farm Input Price Indexes

(1986 = 100)

	Second Quarter 1991	% Change 2nd Quarter 1991/ 1st Quarter 1991	% Change 2nd Quarter 1991/ 2nd Quarter 1990
	Eastern Canada		
Total Farm Input	**113.1**	**-0.4**	**0.8**
Building and fencing	116.0	1.4	-1.4
Machinery and motor vehicles	116.3	-0.7	4.7
Crop production	108.5	0.4	1.0
Animal production	105.3	0.8	0.6
Supplies and services	119.7	-1.8	8.2
Hired farm labour	130.9	1.3	4.7
Property taxes	116.7	0.0	2.0
Interest	118.3	-7.9	-12.6
Farm rent	119.9	0.0	1.4
	Western Canada		
Total Farm Input	**107.5**	**-2.5**	**-1.0**
Building and fencing	104.9	2.1	-2.3
Machinery and motor vehicles	110.2	-2.8	3.5
Crop production	90.6	-7.4	-10.0
Animal production	109.9	1.5	1.7
Supplies and services	108.0	-3.1	2.3
Hired farm labour	121.3	0.8	5.8
Property taxes	119.5	0.0	4.9
Interest	114.8	-6.8	-10.5
Farm rent	102.8	0.0	1.6
	Canada		
Total Farm Input	**110.0**	**-1.5**	**-0.2**
Building and fencing	110.8	1.7	-1.8
Machinery and motor vehicles	112.3	-2.0	4.0
Crop production	96.9	-4.4	-5.9
Animal production	107.2	1.0	1.0
Supplies and services	113.9	-2.4	5.3
Hired farm labour	126.6	1.1	5.1
Property taxes	118.9	0.0	4.3
Interest	116.1	-7.3	-11.4
Farm rent	107.1	0.0	1.5

■

DATA AVAILABILITY ANNOUNCEMENTS

Local Government Finance - Financial Management System Basis

1989 and 1990 Revised Estimates

On a Financial Management System (FMS) basis, revised total local government revenues for 1989 were $54.2 billion, an increase of $3.5 billion (6.9%) from the previous year. Total expenditures were $55.0 billion, an increase of $4.2 billion (8.3%) from 1988. Both the revenue and expenditure increases were slightly greater than the 1983 to 1988 five-year average annual increases of 6.6% for revenues and 6.2% for expenditures.

Revised total local government revenues for 1990 were $58.0 billion, an increase of $3.8 billion (7.1%) from the previous year. Total expenditures amounted to $59.7 billion, an increase of $4.7 billion (8.5%) from 1989. Again, both the revenue and expenditure increases were slightly greater than the 1984 to 1989 five-year average annual increases of 6.9% for revenues and 7.0% for expenditures.

Note to Users

The Financial Management System (FMS) provides a standardized presentation of government accounting for the federal, provincial and local governments in Canada. The individual governments' accounting systems are not directly comparable because the policies and structure of governments differ. The FMS adjusts data from government budgets, estimates, public accounts and other records to provide detailed, intergovernmentally comparable data as well as compatible national aggregates that are consistent over time. Thus, FMS statistics may not accord with the figures published in government financial statements.

Local government data are prepared by Public Institutions Division from various data sources including local government surveys, administrative documents of provincial and local governments and information obtained from provincial government ministries and other divisions within Statistics Canada.

Available on CANSIM: matrices 2764-2776.

For further information on this release, contact Pierre Doucet (613-951-1820) or Jacinthe Bourdeau (613-951-1949), Public Institutions Division.

Data are also available through special tabulation. For more information or general inquiries on Public Institutions Division products or services, contact Patricia Phillips (613-951-0767). ■

Specified Domestic Electrical Appliances

June 1991

Canadian electrical appliances manufacturers produced 89,510 kitchen appliances in June 1991, down 7.3% from the 96,539 appliances produced a year earlier.

Production of home comfort products totalled 18,901 in June 1991, a decrease of 62.3% from the previous year.

Year-to-date production of kitchen appliances amounted to 410,530. Corresponding data for the same period in 1990 totalled 465,030 units.

The June 1991 issue of *Specified Domestic Electrical Appliances* (43-003, $5/$50) will be available at a later date. See "How to Order Publications".

For more detailed information on this release, contact J.-P. Beauparlant (613-951-3526), Industry Division. ■

Cement

June 1991

Canadian manufacturers shipped 1 122 604 tonnes of cement in June 1991, a decrease of 7.2% from the 1 209 186^r (revised) tonnes shipped a year earlier, but an increase of 10.6% from the 1 014 680 tonnes shipped in May 1991.

January-to-June 1991 shipments were 4 082 375 tonnes, down 18.1% from the 4 983 106^r tonnes shipped during the same period in 1990.

Available on CANSIM: matrices 92 and 122 (series 35).

The June 1991 issue of *Cement* (44-001, $5/$50) will be available at a later date. See "How to Order Publications".

For more detailed information on this release, contact Roland Joubert (613-951-3527), Industry Division. ■

Gypsum Products
June 1991

Manufacturers shipped 16 736 thousand square metres of plain gypsum wallboard in June 1991, down 30.5% from the 24 088[r] (revised) thousand square metres shipped in June 1990, but up 3.8% from the 16 129 thousand square metres shipped in May 1991.

Year-to-date shipments for 1991 were 88 981 thousand square metres, a decrease of 33.9% from the first six months of 1990.

Available on CANSIM: matrices 39 and 122 (series 11).

The June 1991 issue of *Gypsum Products* (44-003, $5/$50) will be available at a later date. See "How to Order Publications".

For more detailed information on this release, contact Roland Joubert (613-951-3527), Industry Division. ■

Shipments of Solid Fuel-burning Heating Products
Second Quarter 1991

Shipments of solid fuel-burning heating products totalled $8.1 million for the second quarter of 1991, a decrease of 29.9% from the $11.6 million shipped during the second quarter of 1990.

Data on manufacturers' shipments of Canadian-made solid fuel-burning heating products are now available, as are data on the number of units shipped.

The second quarter 1991 issue of *Shipments of Solid Fuel-burning Heating Products* (25-002, $4.75/$19) will be available at a later date. See "How to Order Publications".

For more detailed information on this release, contact Keith Martin (613-951-3518), Industry Division. ■

PUBLICATIONS RELEASED

Asphalt Roofing, June 1991.
Catalogue number 45-001
(Canada: $5.00/$50.00; United States: US$6.00/US$60.00; Other Countries: US$7.00/US$70.00).

New Motor Vehicle Sales, December 1990.
Catalogue number 63-007
(Canada: $14.40/$144.00; United States: US$17.30/US$173.00; Other Countries: US$20.20/US$202.00).

The paper used in this publication meets the minimum requirements of American National Standard for Information Sciences – Permanence of Paper for Printed Library Materials, ANSI Z39.48 – 1984.

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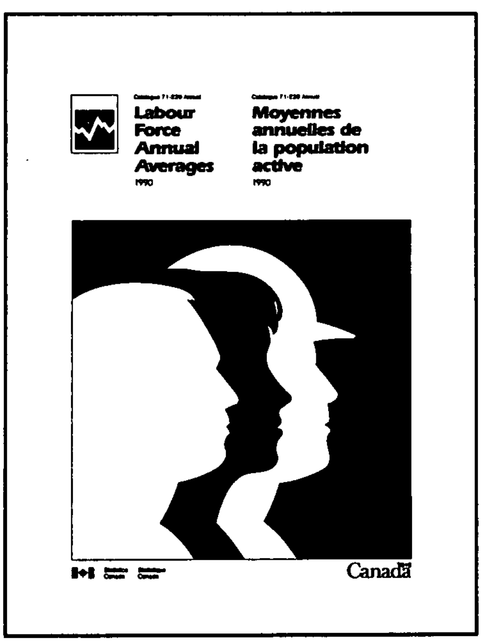

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