

Thursday, January 16, 1992

MAJOR RELEASE

- Monthly Survey of Manufacturing, November 1991

Shipments increased $0.6 \%$ in November, partially offsetting decreases in the previous two months. However, unfilled orders resumed their downward trend following a slight increase in October.

DATA AVAILABILITY ANNOUNCEMENTS

Steel Primary Forms, Week Ending January 11, 1992
Soft Drinks, December 1991

## MAJOR RELEASE

## Monthly Survey of Manufacturing

November 1991

## Seasonally Adjusted

Shipments increased $0.6 \%$ in November, partially offsetting the combined decline of $2.2 \%$ recorded over the previous two months. In terms of value, the largest increases in November shipments were in non-durable goods industries - such as food, tobacco, and refined petroleum and coal products industries. Unfilled orders declined $0.3 \%$, resuming the pattern of monthly decreases evident since April 1989 with a few minor exceptions - such as the slight increase last month. After 10 monthly declines, inventory levels for November showed no change from the previous month. New orders increased $0.2 \%$, largely due to increases in the non-durable goods industries noted above.

The short-term trend smooths out irregular month-to-month movements which are not sustained over a longer period. After increasing in April, May and June, the short-term trend for shipments showed no change in July and August and then declined in the two most recent periods (September and October). The shipments trend for the motor vehicle, parts and accessories industries declined for the first time since January 1991. The trend for unfilled orders has declined since April 1989 and the decline in the inventory trend has lasted almost two years.

## Highlights

- Preliminary estimates indicate that manufacturers' shipments were $\$ 23.1$ billion in November, an increase of $0.6 \%$ from October. Thirteen of the 22 major groups recorded increases with the food ( $3.4 \%$ ) and refined petroleum and coal products ( $4.1 \%$ ) industries reporting the largest increases in value.
- The trend for shipments declined over the two most recent periods. Shipments trends for 10 of the 22 major groups (accounting for $51 \%$ of shipment values) fell over the three most recent periods. The largest industries, in value terms, included the food, paper and allied products, chemicals, and refined petroleum and coal
products industries. Partially offsetting these declines were the trends for eight major groups (accounting for $20 \%$ of shipment values) which continued to increase in the three most recent periods but generally at a slower pace. These industries, in terms of largest value, included the primary metals and wood industries. Industries for which the trend had been increasing but began to decrease in the most recent month included the transportation equipment and primary textiles industries.
- Inventories (owned) remained unchanged in November at $\$ 34.5$ billion, following 10 monthly declines. Higher levels in the transportation equipment industries ( $2.9 \%$ ) were partially offset by decreases in 15 of the remaining 21 major groups. The trend for inventories (owned) has been declining since January 1990.
- The inventories to shipments ratio declined from 1.50 in October to 1.49 in November. The trend, which had been declining since February 1991, remained unchanged in the two most recent periods.
- Unfilled orders decreased $0.3 \%$ to $\$ 24.0$ billion in November, resuming the pattern of monthly decreases evident since April 1989 with a few minor exceptions - such as the slight increase in October. An increase in the transportation equipment industries $(0.7 \%)$ was more than offset by decreases in the machinery ( $-3.4 \%$ ), electrical and electronic products ( $-1.3 \%$ ), and fabricated metals ( $-2.6 \%$ ) industries. The trend for unfilled orders continued to fall but at a slower pace in recent months.

Unfilled orders are the stock of orders which will generate future shipments, assuming that orders are not cancelled. New orders are defined as the sum of shipments for the current month (i.e., orders received this month and shipped within the same month) plus the change in unfilled orders.

- New orders increased $0.2 \%$ to $\$ 23.1$ billion following two monthly decreases. The trend for new orders declined in the most recent period.


## The Daily, January 16, 1992





## Year-to-date

- Manufacturers' shipments for the first 11 months of 1991 were estimated at $\$ 254.3$ billion, $6.0 \%$ lower than the value for the corresponding period in 1990.

Available on CANSIM: matrices 9550-9580.

For more information, please consult the November 1991 issue of Monthly Survey of Manufacturing (31-001, $\$ 17.30 / \$ 173$ ), available shortly. Data for shipments by province in greater detail than normally published may be available on request.

For further information, please contact Bob Traversy (613-951-9497) or the Monthly Survey of Manufacturing Section (613-951-9832), Industry Division.

Shipments, Inventories and Orders in all Manufacturing Industries
November 1991


* The short-term trend represents a weighted average of the data.


## DATA AVAILABILITY ANNOUNCEMENTS

## Steel Primary Forms

Week Ending January 11, 1992
Preliminary estimates indicate that Canadian steel primary forms production for the week ending January 11, 1992 totalled 254014 tonnes, up $24.6 \%$ from the preceding week's total of 203927 tonnes but down $2.4 \%$ from the year-earlier level of 260200 tonnes. The cumulative total in 1992 was 370544 tonnes, a decrease of $1.9 \%$ from 377598 tonnes for the same period in 1991.

For more detailed information on this release, contact Greg Milsom (613-951-9827), Industry Division.

## Soft Drinks

December 1991
Data on soft drinks for December 1991 are now available.

## Available on CANSIM: matrix 196.

The publication Monthly Production of Soft Drinks $(32-001, \$ 2.70 / \$ 27)$ will be released at a later date.

For further information, contact Peter Zylstra (613-951-3511), Industry Division.

## PÜBLICATIONS RELEASED

Cereals and Oilseeds Review, October 1991.<br>Catalogue number 22-007<br>(Canada: $\$ 13.80 / \$ 138$; United States:<br>US\$16.60/US\$166; Other Countries:<br>US\$19.30/US\$193).<br>Crude Petroleum and Natural Gas Production, September 1991.<br>Catalogue number 26-006<br>(Canada: $\$ 10 / \$ 100$; United States: US\$12/US\$120; Other Countries: US\$14/US\$140).<br>Industry Price Indexes, October 1991. Catalogue number 62-011<br>(Canada: $\$ 18.20 / \$ 182$; United States:<br>US\$21.80/US\$218; Other Countries:<br>US\$25.50/US\$255).

Canada's International Transactions in Securities, October 1991.<br>Catalogue number 67-002<br>(Canada: $\$ 15.80 / \$ 158$; United States:<br>US\$19/US\$190; Other Countries: US\$22.10/US\$221).<br>Salaries and Salary Scales of Full-time Teaching Staff at Canadian Universities, 1991-92 Preliminary. Catalogue number 81-258P<br>(Canada: \$22; United States: US\$26;<br>Other Countries: US\$31).

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## The Daily

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