

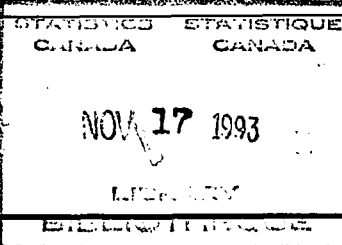
The Daily

Statistics Canada

NE S'EMPRUNTE PAS

Wednesday, November 17, 1993

For release at 8:30 a.m.



MAJOR RELEASES

- Monthly Survey of Manufacturing, September 1993**
 The value of shipments increased 1.4% to a record \$26.3 billion, surpassing the previous high recorded in February 1989. Nineteen of the 22 major groups had higher shipment levels. 2
- Building Permits, September 1993**
 The seasonally adjusted value of building permits issued declined 4.5% to \$2,080 million in September, down from the revised \$2,178 million in August. The non-residential (-5.1%) and residential (-4.2%) sectors were both responsible for the decrease in the total value of building permits. 5

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The Violence Against Women Survey

Tomorrow, *The Daily* will be dedicated to the results from the Survey on Violence Against Women. The issue will include rates of violent victimization and wife assault, the impact of victimization, the use of justice and social services, perceptions of personal safety and self-protection, as well as information on the survey's methodology. For more information, contact your nearest Statistics Canada Regional Reference Centre.



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MAJOR RELEASES

Monthly Survey of Manufacturing

September 1993

The seasonally adjusted value of manufacturers' shipments rose to a record \$26.3 billion in September, surpassing the previous high of \$26.2 billion recorded in February 1989.

The value of shipments increased 1.4% in September, the third increase in the last four months. Increases were widespread as 19 of the 22 major groups reported higher shipment levels. This contrasts with the increase in August, when gains were concentrated in only two industries: the motor vehicle, parts and accessories and the wood industries.

Much of the strength in shipments in recent months has come from the export-oriented industries, notably the automotive sector, wood and primary metals. This corresponds to recent U.S. indicators that showed the U.S. economy gaining strength. New home sales in the United States jumped 21% in September, while the U.S. gross domestic product, fuelled by consumer spending, had its best quarterly performance this year. Also, the recent strength in motor vehicle shipments may have been in anticipation of announced plant shutdowns during the later part of this year, when several car manufacturers will change certain production lines to new models.

The short-term trend smooths irregular month-to-month movements not sustained over a longer period. The trend for shipments rose 0.8% in the most recent period, reflecting strong increases in the motor vehicle, parts and accessories, wood, and primary metals industries.

The trend for unfilled orders decreased for the first time in a year. The inventories trend increased in the five most recent periods after three years of declines.

Shipments

Preliminary estimates indicate that manufacturers' shipments increased 1.4% to \$26.3 billion in September. The September increase was widespread across the major groups, unlike the increase in the previous month (which was concentrated in the motor vehicle, parts and accessories and the wood

industries). Nineteen of the 22 major groups (accounting for 95% of shipments values) increased; three decreased. The largest increases in dollar terms were in wood (+4.7%), transportation equipment (+1.2%) and primary metals (+3.1%).

The trend for shipments rose 0.8% in the most recent period, reflecting increases in 16 of the 22 major groups (accounting for 82% of shipment values). The rate of increase in the trend had been slowing during the first five months of 1993. However, the month-to-month percentage change in the trend increased from 0.1% in May to 0.8% in the most recent period, reflecting strong shipment levels over the last four months in the motor vehicle, parts and accessories, wood, and primary metals industries.

Inventories (owned)

Inventories (owned) edged down 0.1% to \$35.1 billion, the first decline after six consecutive increases. The largest decreases were in the refined petroleum and coal products (-9.1%) and food (-0.8%) industries. Electrical and electronic products (+1.9%) and wood (+1.4%) recorded the largest increases. The trend for inventories (owned) has risen over the five most recent periods, following three years of declines.

Inventories/shipments ratio

The inventories/shipments ratio declined from 1.35 in August to 1.33 in September, an historical low. The trend has been relatively stable since February.

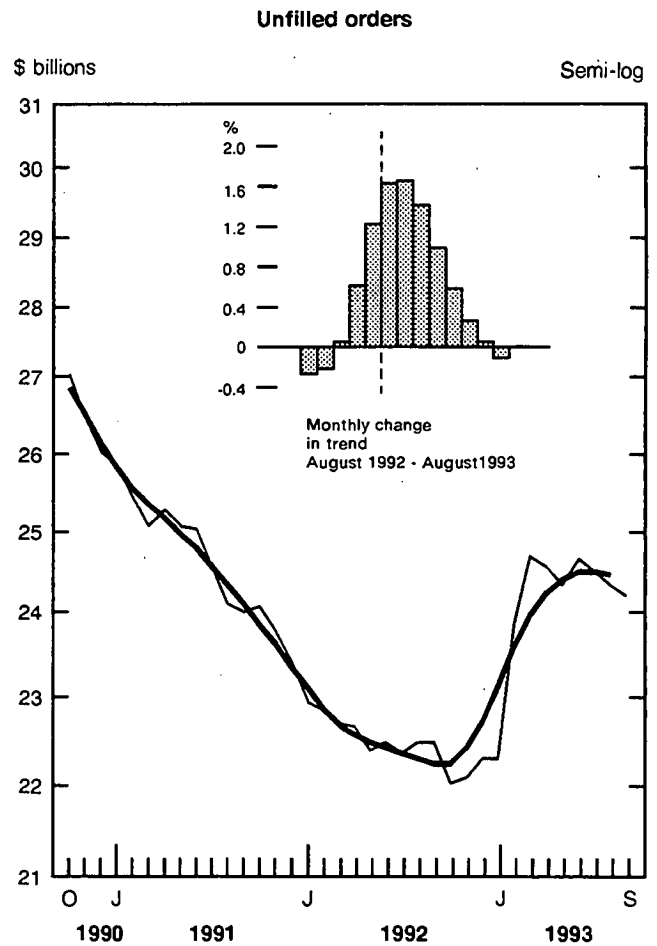
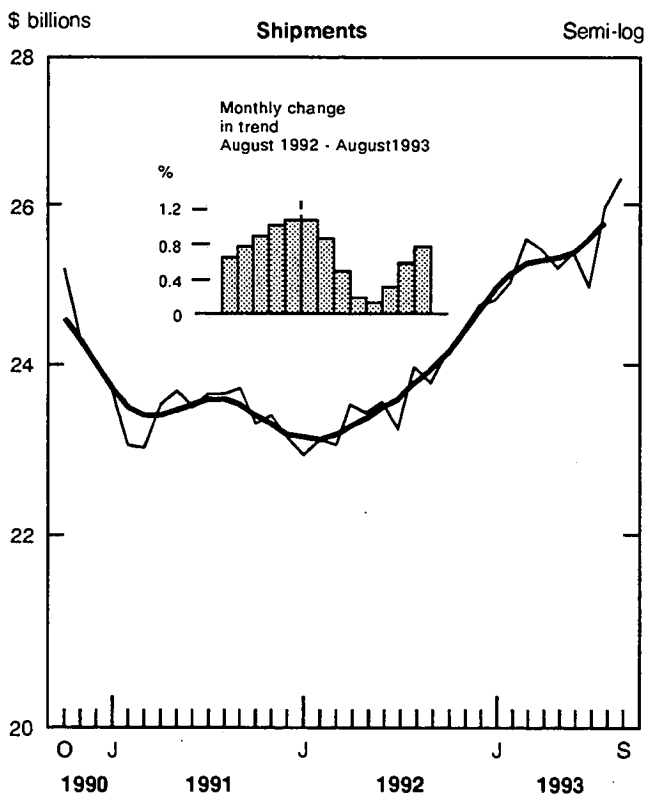
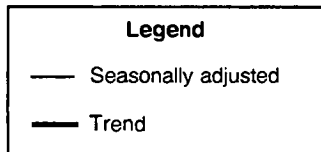
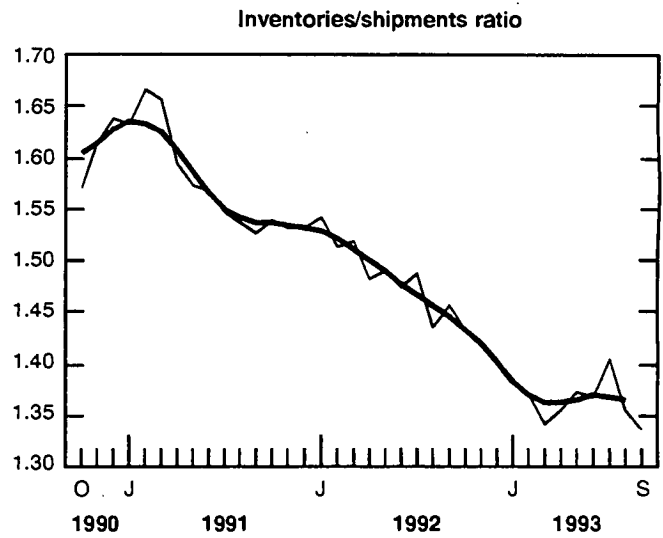
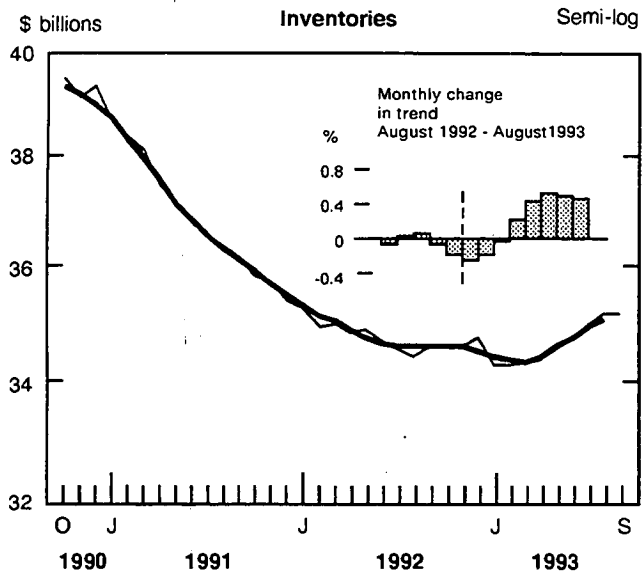
Unfilled orders

Unfilled orders decreased 0.6% to \$24.2 billion, the fifth decline in six months. Transportation equipment (-0.9%) accounted for most of September's decrease. The trend decreased for the first time in a year.

Unfilled orders are a stock of orders that will contribute to future shipments, assuming that orders are not cancelled.

New orders are the sum of shipments for the current month (i.e., orders received and shipped within the same month) plus the change in unfilled orders.

Manufacturers' inventories, shipments and unfilled orders



New orders

New orders increased 1.5% to \$26.2 billion in September. The trend for new orders rose over the last two periods after declining in April and May.

Year-to-date

Manufacturers' shipments for the first nine months of 1993 were estimated at \$228.6 billion, 8.6% higher than in the corresponding period in 1992.

Available on CANSIM: matrices 9550-9580.

For more information, please consult the September 1993 issue of *Monthly Survey of Manufacturing* (31-001, \$17.30/\$173), available shortly.

Data for shipments by province in greater detail may be available on request. For further information, please contact Bob Traversy, Information and Classification Section (613-951-9497) or the Monthly Survey of Manufacturing Section (613-951-9832), Industry Division.

Shipments, inventories and orders in all manufacturing industries

Period		Shipments		Inven- tories		Unfilled orders		New orders		Shipments		Inven- tories		Unfilled orders		New orders	
		unadjusted								seasonally adjusted							
		\$ millions															
September	1992	25,020	34,160	22,427	24,798	23,769	34,569	22,495	23,750								
October	1992	25,677	34,125	21,917	25,167	24,146	34,545	22,053	23,704								
November	1992	24,557	34,262	21,856	24,496	24,387	34,575	22,101	24,434								
December	1992	23,088	33,986	21,912	23,144	24,711	34,656	22,309	24,919								
January	1993	21,677	34,451	22,249	22,014	24,747	34,212	22,323	24,761								
February	1993	23,254	34,854	23,875	24,880	25,003	34,211	23,864	26,544								
March	1993	27,361	34,985	24,893	28,378	25,567	34,263	24,723	26,426								
April	1993	25,807	34,771	24,823	25,738	25,412	34,322	24,595	25,284								
May	1993	26,218	34,617	24,447	25,841	25,188	34,496	24,354	24,946								
June	1993	27,443	34,432	24,718	27,714	25,392	34,667	24,679	25,717								
July	1993	22,406	34,544	24,614	22,302	24,925	34,921	24,526	24,772								
August	1993	25,894	34,987	24,390	25,670	25,981	35,142	24,360	25,815								
September	1993	27,841	34,701	24,159	27,611	26,340	35,116	24,216	26,196								

Shipments		Inventories		Inventories/ shipments ratio		Unfilled orders		New orders			
S.A.	Trend	S.A.	Trend	S.A.	Trend	S.A.	Trend	S.A.	Trend		
seasonally adjusted											
month-to-month % change				ratio		month-to-month % change					
September	1992	-0.8	0.8	0.6	0.0	1.45	1.44	-0.1	-0.2	-1.4	0.8
October	1992	1.6	0.9	-0.1	0.0	1.43	1.43	-2.0	0.1	-0.2	1.2
November	1992	1.0	1.0	0.1	-0.1	1.42	1.42	0.2	0.7	3.1	1.6
December	1992	1.3	1.1	0.2	-0.2	1.40	1.40	0.9	1.4	2.0	1.7
January	1993	0.1	1.1	-1.3	-0.2	1.38	1.38	0.1	1.9	-0.6	1.5
February	1993	1.0	0.9	0.0	-0.2	1.37	1.37	6.9	1.9	7.2	0.9
March	1993	2.3	0.5	0.2	0.0	1.34	1.36	3.6	1.6	-0.4	0.3
April	1993	-0.6	0.2	0.2	0.2	1.35	1.36	-0.5	1.1	-4.3	-0.3
May	1993	-0.9	0.1	0.5	0.4	1.37	1.36	-1.0	0.7	-1.3	-0.3
June	1993	0.8	0.3	0.5	0.5	1.37	1.37	1.3	0.3	3.1	0.0
July	1993	-1.8	0.6	0.7	0.5	1.40	1.37	-0.6	0.1	-3.7	0.3
August	1993	4.2	0.8	0.6	0.4	1.35	1.36	-0.7	-0.1	4.2	0.6
September	1993	1.4	*	-0.1	*	1.33	*	-0.6	*	1.5	*

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

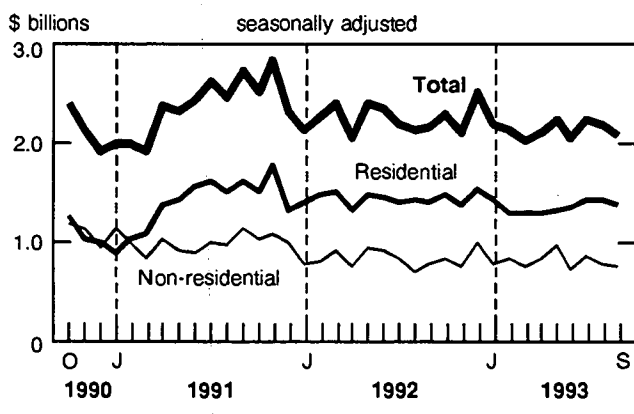
Building Permits

September 1993 (Preliminary)

The seasonally adjusted value of building permits issued declined 4.5% to \$2,080 million in September, down from the revised \$2,178 million in August. The non-residential (-5.1%) and residential (-4.2%) sectors were both responsible for the decrease in the total value of building permits.

All regions reported decreases in the total value of building permits in September. The largest drops occurred in Quebec (-11.3%) and the Prairies (-8.3%).

Value of building permits issued



Residential sector

The value of residential building permits decreased 4.2% to \$1,357 million in September, from August's revised level of \$1,416 million.

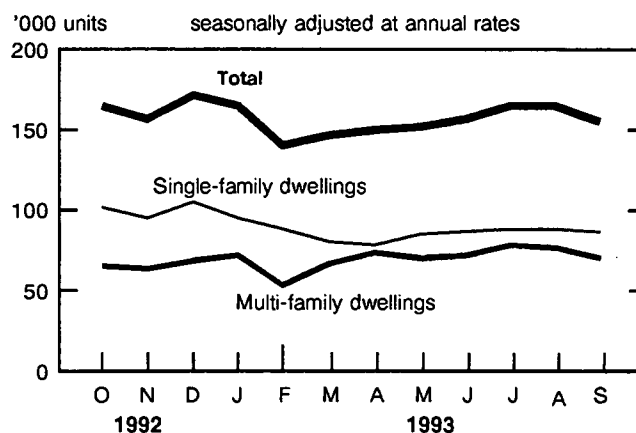
All regions posted decreases in the value of residential building permits in September except Ontario (+2.4%), where the single-family dwelling sector recorded a notable gain (+7.8%).

The multi-family dwelling sector declined 12.0% in September to \$406 million, largely due to the Prairies (-29.3%), Quebec (-20.0%) and the Atlantic (-15.2%) region. The single-family dwelling sector also recorded a slight decrease (-0.4%) in the value of building permits.

The January to September 1993 seasonally adjusted value of residential building permits dropped 5.7% from the corresponding period in 1992. Ontario (-16.7%) and Quebec (-4.8%) reported the largest decreases; British Columbia (+8.0%) posted the biggest increase.

The seasonally adjusted total number of dwelling units authorized decreased 5.4% in September to 155,000 units at an annual rate, compared with 164,000 units in August. The decrease was mainly attributable to the multi-family dwelling sector (-9.1% to 69,000 units). The Prairies (-25.7%) and Quebec (-17.2%) were responsible for the sector's shortfall.

Dwelling units authorized

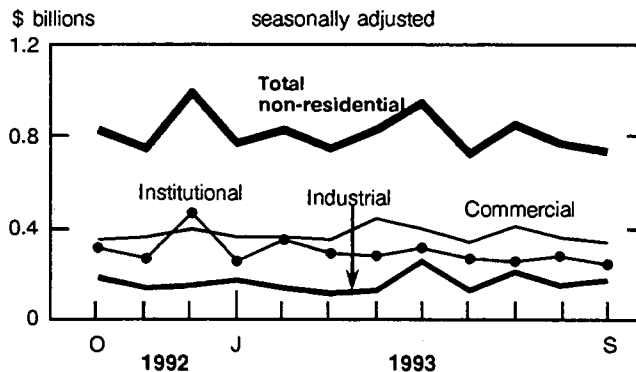


Non-residential sector

The value of non-residential building permits for September decreased 5.1% to \$724 million, down from \$762 million in August.

The Prairies (-14.3%), Ontario (-6.1%) and Quebec (-5.6%) shared in the non-residential sector slump due mainly to the poor performance of the institutional sector.

Value of non-residential permits issued



Industrial projects posted an increase of 10.5%; however, this was not enough to offset declines in institutional (-12.7%) and commercial (-5.7%) projects. The downturn in institutional construction stemmed from all regions except British Columbia (+49.7%).

The January to September 1993 seasonally adjusted value of non-residential building permits fell 2.0% from the same period last year.

Building permits indexes

The building permits index (excluding engineering projects) in 1986 constant dollars fell 3.6% to 88.8.

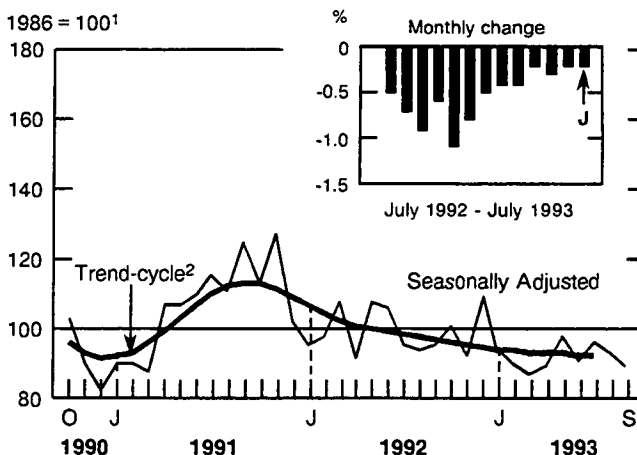
The short-term trend index for building permits (which smooths irregular month-to-month movements not sustained on a longer period) went down 0.2% in July 1993 to 91.7. The last four month-over-month declines averaged 0.2%.

The short-term trend index for residential building permits edged up 0.2% in July 1993 to 101.5, compared to June's revised level of 101.3. This was only the second consecutive monthly increase since October 1991 (June was up 0.1%). The non-residential sector on the other hand was down 0.9% to 78.5.

Available on CANSIM: matrices 80 (levels 3-7, 16-22), 129, 137, 443, 989-992, 994, 995 and 4073.

The September 1993 issue of *Building Permits* (64-001, \$22.10/\$221) will be released on November 25. The residential building permits advance estimate for October will be released on December 1.

Building permits indexes



¹ This series is deflated by using the construction input price index, which includes cost of material and labor.

² The trend-cycle shows the seasonally adjusted value of building permits without irregular influences that can obscure the short-term trend. In order to reduce the number of false signals in the construction activity series, the trend-cycle is published with a two-month lag.

For further information on statistics, contact Johanne Bureau (613-951-2583). For analytical information, contact Nathalie Léveillé (613-951-2025), Current Investment Indicators Section, Investment and Capital Stock Division. □

Value of residential and non-residential building permits

Regions and type of construction	August 1993 ^r	September 1993 ^p	September 1992 to September 1993	August 1993 to September 1993	August 1993 ^r	September 1993 ^p	September 1992 to September 1993	August 1993 to September 1993
	seasonally adjusted				unadjusted			
	\$ thousands		% change		\$ thousands		% change	
Canada								
Total construction	2,178,119	2,080,470	-3.5	-4.5	2,317,759	2,393,096	-2.1	3.3
Residential	1,415,837	1,356,842	-2.6	-4.2	1,519,570	1,529,972	-0.3	0.7
Non-residential	762,282	723,628	-5.3	-5.1	798,189	863,124	-5.2	8.1
Industrial	144,952	160,108	31.5	10.5	163,256	189,880	43.1	16.3
Commercial	351,096	330,977	-19.2	-5.7	338,171	392,407	-19.9	16.0
Institutional	266,234	232,543	-0.2	-12.7	296,762	280,837	-2.4	-5.4
Atlantic								
Total construction	116,026	114,202	-10.2	-1.6	145,001	140,408	-11.7	-3.2
Residential	81,409	78,576	-10.2	-3.5	108,831	96,846	-10.2	-11.0
Non-residential	34,617	35,626	-10.1	2.9	36,170	43,562	-14.7	20.4
Industrial	4,369	4,751	14.5	8.7	4,114	3,298	12.0	-19.8
Commercial	22,581	25,331	26.0	12.2	25,210	33,162	27.1	31.5
Institutional	7,667	5,544	-63.9	-27.7	6,846	7,102	-67.8	3.7
Quebec								
Total construction	429,479	380,749	-9.0	-11.3	429,094	461,286	-12.1	7.5
Residential	268,594	228,867	-6.0	-14.8	256,097	270,030	-7.0	5.4
Non-residential	160,885	151,882	-13.2	-5.6	172,997	191,256	-18.4	10.6
Industrial	21,515	32,303	62.2	50.1	26,891	29,143	38.4	8.4
Commercial	75,877	70,844	-36.1	-6.6	67,111	89,532	-35.7	33.4
Institutional	63,493	48,735	10.1	-23.2	78,995	72,581	-2.0	-8.1
Ontario								
Total construction	749,527	744,295	-2.8	-0.7	833,929	848,728	1.6	1.8
Residential	474,048	485,577	-0.5	2.4	539,457	559,603	3.9	3.7
Non-residential	275,479	258,718	-6.8	-6.1	294,472	289,125	-2.8	-1.8
Industrial	83,234	80,468	13.8	-3.3	101,692	89,615	29.2	-11.9
Commercial	92,271	112,248	-14.0	21.7	76,675	122,000	-11.3	59.1
Institutional	99,974	66,002	-13.5	-34.0	116,105	77,510	-14.3	-33.2
Prairies								
Total construction	320,214	293,540	-11.6	-8.3	343,211	343,654	-7.2	0.1
Residential	207,406	196,897	-5.2	-5.1	225,866	217,752	-1.4	-3.6
Non-residential	112,808	96,643	-22.2	-14.3	117,345	125,902	-15.8	7.3
Industrial	23,396	20,427	64.4	-12.7	19,119	39,268	84.6	105.4
Commercial	58,608	60,233	-2.1	2.8	62,445	67,358	-0.4	7.9
Institutional	30,804	15,983	-68.2	-48.1	35,781	19,276	-68.2	-46.1
British Columbia¹								
Total construction	562,873	547,684	6.6	-2.7	566,524	599,020	8.0	5.7
Residential	384,380	366,925	0.3	-4.5	389,319	385,741	2.4	-0.9
Non-residential	178,493	180,759	22.3	1.3	177,205	213,279	19.8	20.4
Industrial	12,438	22,159	52.6	78.2	11,440	28,556	58.2	149.6
Commercial	101,759	62,321	-28.0	-38.8	106,730	80,355	-32.6	-24.7
Institutional	64,296	96,279	105.7	49.7	59,035	104,368	156.2	76.8

¹ Building permits issued for the Yukon and the Northwest Territories are included in the British Columbian region.^p Preliminary figures.^r Revised figures.

DATA AVAILABILITY ANNOUNCEMENTS

Department Store Sales Advance Release

October 1993

Department stores sales including concessions for October totalled \$1,114 million, down 2.7% from October 1992. Sales for the major department stores were \$592 million (-6.0%), while sales for the junior category were \$522 million (+1.3%).

Note that this advance release is a very preliminary indicator of the Monthly Department Store Sales by Province and Metropolitan Area Survey.

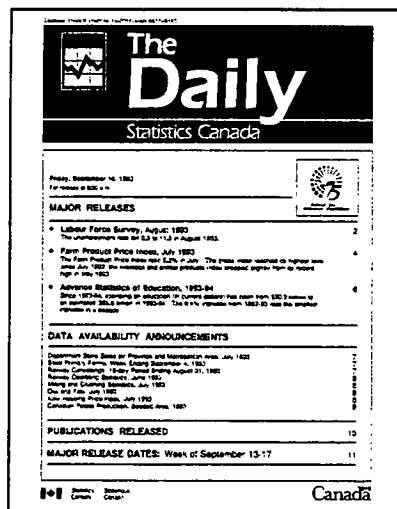
For further information on this release, contact Diane Lake (613-951-9824), Retail Trade Section, Industry Division. ■

Pack of Processed Peas 1993

Data on the pack of processed peas for 1993 are now available.

Pack of Processed Peas (32-235, \$13) will be available shortly. See "How to Order Publications".

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



Statistics Canada's Official Release Bulletin

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PUBLICATIONS RELEASED

Oils and Fats, September 1993.

Catalogue number 32-006

(Canada: \$5/\$50; United States: US\$6/US\$60; Other Countries: US\$7/US\$70).

Shipments of Plastic Film and Bags

Manufactured from Resin, Quarter Ended

September 1993.

Catalogue number 47-007

(Canada: \$6.75/\$27; United States: US\$8/US\$32; Other Countries: US\$9.50/US\$38).

Energy Statistics Handbook, November 1993.

Catalogue number 57-601

(Canada: \$300; United States: US\$360; Other Countries: US\$420).

Employment, Earnings and Hours, August 1993.

Catalogue number 72-002

(Canada: \$28.50/\$285; United States: US\$34.20/US\$342; Other Countries: US\$39.90/US\$399).

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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Each centre has facilities to retrieve information from CANSIM and E-STAT, Statistics Canada's computerized data retrieval systems. A telephone inquiry service is available with toll-free access for clients who are located outside local calling areas. Many other valuable services – from seminars to consultations – are also offered. Call or write your nearest Statistics Canada Regional Reference Centre for more information.

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Fax: 1-709-772-6433

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Fax: 1-514-283-9350

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If outside the local calling area, please dial
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Fax: 1-613-951-0581

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Fax: 1-204-983-7543

Saskatchewan

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Fax: 1-306-780-5403

Alberta and the Northwest Territories

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