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# The Daily

## Statistics Canada

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## MAJOR RELEASES



## DATA AVAILABILITY ANNOUNCEMENTS



## PUBLICATION RELEASED 

# MAJOR RELEASES

## Quarterly Business Conditions Survey, Manufacturing Industries

January 1994

Manufacturers' balance of opinion concerning employment prospects increased substantially to a positive level between the October 1993 and January 1994 surveys. The balance of opinion concerning the expected volume of production, the current level of orders received, and the backlog of unfilled orders also improved.

### Seasonally adjusted

In January 1994, the balance of opinion concerning employment prospects in the coming three months increased by nine points to +1. The balance had not been positive since April 1989, when it stood at +4. This is a major improvement from the balance of -13 recorded in the April and July 1993 surveys and from the lows posted in 1991 in January (-24) and April (-26).

The balance of +1 in January is calculated by subtracting the pessimistic 18% who expected a decrease in employment in the next three months from the optimistic 19% who anticipated an increase in employment. The remaining 63% expected little change in employment levels.

The balance of opinion for current orders received increased by seven points to +13 between the October 1993 and January 1994 surveys. The largest contributors to this increase were the primary metal and machinery industries.

In January 1994, 30% of manufacturers expected their volume of production for the coming three months would be higher. This was offset by 30% of manufacturers who expected their production to decrease, leaving the balance of opinion at zero. This is a four-point improvement over the balance of -4 posted in the October 1993 survey.

The balance of opinion concerning the backlog of unfilled orders increased slightly, from -4 in October 1993 to -3 in January 1994. Although still negative, this is a significant advance from the -15 to -21 posted in the January, April and July 1993 surveys. The last positive balance for unfilled orders was +4 in January 1989. (Unfilled orders are the stock of orders that will generate future shipments, assuming that orders are not cancelled.)

***Note to users***

*The balance of opinion is the difference between the proportion with a positive response (e.g., higher volume of production) and the proportion with a negative response (e.g., lower volume of production). Both the unadjusted and seasonally adjusted 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 for the other two components (the positive and negative components) from 100.*

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

*Production, inventories and orders responses to the Business Conditions Survey are weighted by the value of the respondent's shipments reported to the 1989 Annual Survey of Manufactures. Weights for the employment prospects responses are based on the number of employees reported to the Annual Survey of Manufactures.*

Manufacturers' balance of opinion concerning current levels of finished-product inventories decreased by one point to -25 in the January 1994 survey. The balance has remained in the -17 to -26 range for the last six surveys.

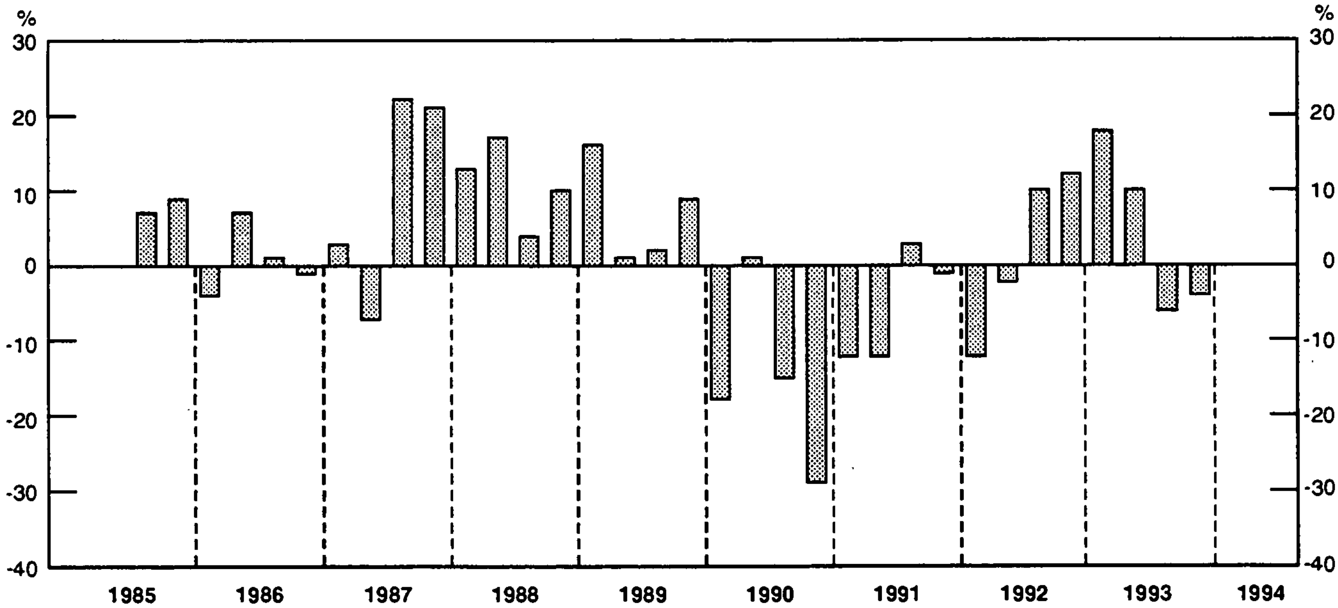
### Unadjusted

About 84% of manufacturers did not report any particular production difficulties in the January 1994 survey. About 7% (up from 5% in the April 1993 survey) reported that a shortage of working capital impeded their level of production. A shortage of skilled labour was indicated as a production impediment by 2% of manufacturers. For the thirteenth consecutive quarter, less than 0.5% of respondents reported that a shortage of unskilled labour is impeding their production.

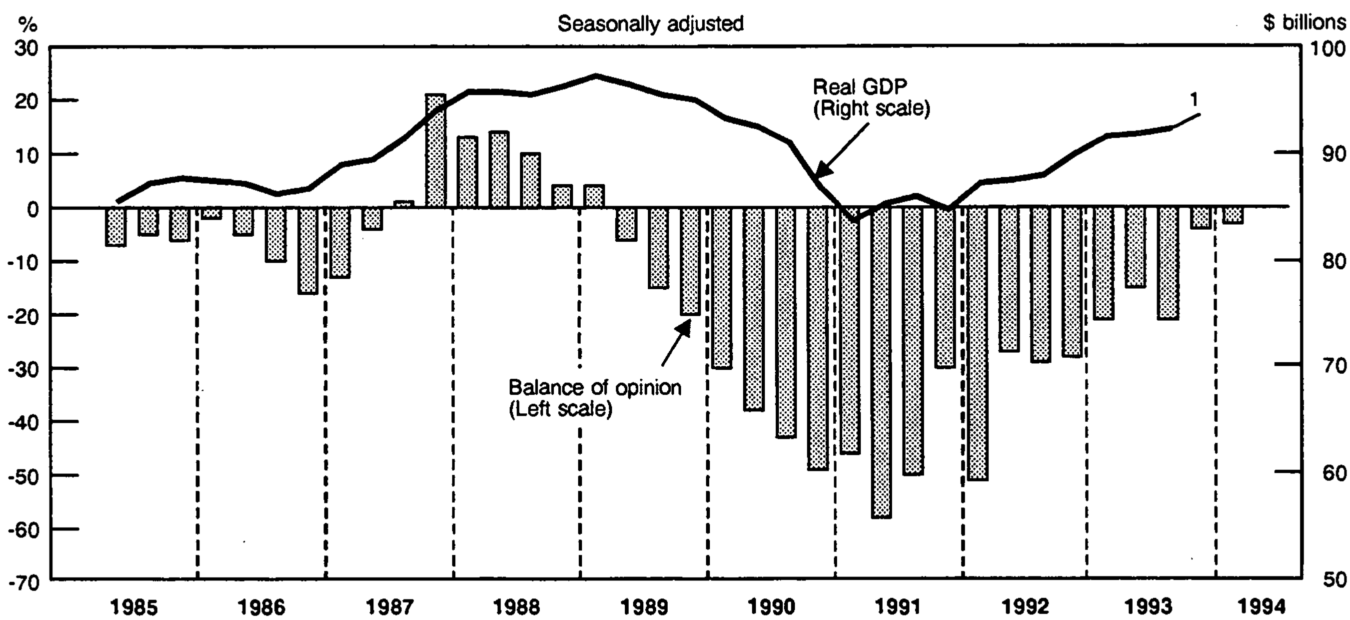
**Available on CANSIM: matrices 2843-2845.**

For further information, contact Claude 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**




[1] October and November 1993 average.

## Business Conditions Survey, Canadian manufacturing industries

| | January 1993 | April 1993 | July 1993 | October 1993 | January 1994 |
|---|---|---|---|---|---|
| **Volume of production during next three months compared with last three months will be:** | seasonally adjusted | | | | |
| About the same | 44 | 46 | 44 | 52 | 40 |
| Higher | 37 | 32 | 25 | 22 | 30 |
| Lower | 19 | 22 | 31 | 26 | 30 |
| Balance | 18 | 10 | -6 | -4 | 0 |
| | unadjusted | | | | |
| Balance | 7 | 28 | -17 | -1 | -11 |
| **Orders received are:** | seasonally adjusted | | | | |
| About the same | 57 | 58 | 57 | 64 | 67 |
| Rising | 28 | 27 | 22 | 21 | 23 |
| Declining | 15 | 15 | 21 | 15 | 10 |
| Balance | 13 | 12 | 1 | 6 | 13 |
| | unadjusted | | | | |
| Balance | 11 | 14 | 2 | 3 | 12 |
| **Present backlog of unfilled orders is:** | seasonally adjusted | | | | |
| About normal | 65 | 63 | 59 | 64 | 71 |
| Higher than normal | 7 | 11 | 10 | 16 | 13 |
| Lower than normal | 28 | 26 | 31 | 20 | 16 |
| Balance | -21 | -15 | -21 | -4 | -3 |
| | unadjusted | | | | |
| Balance | -22 | -17 | -23 | -2 | -3 |
| **Finished product inventory on hand is:** | seasonally adjusted | | | | |
| About right | 67 | 74 | 75 | 62 | 65 |
| Too low | 4 | 4 | 4 | 7 | 5 |
| Too high[1] | 29 | 22 | 21 | 31 | 30 |
| Balance | -25 | -18 | -17 | -24 | -25 |
| | unadjusted | | | | |
| Balance | -25 | -19 | -17 | -23 | -25 |
| **Employment during the next three months will:** | seasonally adjusted | | | | |
| Change little | 66 | 67 | 69 | 64 | 63 |
| Increase | 11 | 10 | 9 | 14 | 19 |
| Decrease | 23 | 23 | 22 | 22 | 18 |
| Balance | -12 | -13 | -13 | -8 | 1 |
| | unadjusted | | | | |
| Balance | -17 | -3 | -12 | -16 | -5 |
| **Sources of production difficulties:** | unadjusted | | | | |
| Working capital shortage | 6 | 5 | 6 | 6 | 7 |
| Skilled labour shortage | 2 | 2 | 2 | 3 | 2 |
| Unskilled labour shortage | 0 | 0 | 0 | 0 | 0 |
| Raw material shortage | 3 | 4 | 4 | 4 | 3 |
| Other difficulties | 5 | 3 | 4 | 4 | 4 |
| No difficulties | 84 | 85 | 83 | 83 | 84 |

[1] *No evident seasonality.*

■

# Field Crop Reporting Series, No. 1: Stocks of Grain

December 31, 1993

Farm stocks of all wheat excluding durum at December 31, 1993 were up 6.3% from the previous year, to 19.7 million tonnes, despite a production decrease of 8.5%. This increase in stocks was due to a decline in the volume of wheat marketings between August and December 1993, compared with the same period in 1992. Stocks in all positions (farm and commercial) totalled 24.1 million tonnes, up 2.6% from December 1992.

Farm stocks of durum wheat at December 31 amounted to 3.0 million tonnes, up 4.6% from the year before. Stocks in all positions totalled 3.7 million tonnes, down 1.3% from the year before.

### Canola and flaxseed

As a result of record production, canola stocks on farms at December 31 totalled 2.3 million tonnes, up 21.0% from 1.9 million tonnes on farms the previous December. However, record marketings from August through December pushed the ratio of farm stocks to production down to about 45.0%, from the more usual level of 60.0%.

Despite an 85.6% increase in flaxseed production, the highest marketings since 1986 for the August to December period left only 390 thousand tonnes of farm stocks at December 31, a 5.4% increase from the previous December. Flaxseed stocks at all positions totalled 584 thousand tonnes, up 9.6% from a year earlier.

### Corn for grain and soybeans

Farm stocks of corn for grain amounted to 3.5 million tonnes at December 31, up 5.9% from 3.3 million tonnes a year earlier. Due to the late Quebec harvest, revisions have been made to the corn-for-grain production estimates. The revised Quebec 1993 harvested area is 290,000 hectares and production is 1,870,000 tonnes, up 30.8% from the production in 1992.

Farm stocks of soybeans at December 31, 1993 amounted to 555 thousand tonnes, up 6.3% from a year earlier.

### Barley

Barley farm stocks were 10.1 million tonnes at December 31, 1993, the highest level since December 1987, when farm stocks were 10.3 million tonnes. Stocks of barley in all positions totalled 11.3 million tonnes at December 31, 1993.

*Field Crop Reporting Series, No. 1: Stocks of Canadian Grain at December 31, 1993* (22-002, $12/$80) is now available. See "How to Order Publications".

For further information, please contact the Crops Section (613-951-8717), Agriculture Division. ■

## Non-residential Building Construction Price Index

Fourth Quarter 1993

The composite index for the seven sampled cities in the fourth quarter of 1993 increased by 0.2% from the third quarter and by 1.1% from the fourth quarter of 1992.

Halifax recorded the largest quarterly increase at 0.5%, partly a result of the increase in the Provincial Sales Tax from 10% to 11% that became effective on October 1, 1993. Vancouver recorded the second largest increase at 0.4%, followed by Montréal, Ottawa, Toronto, and Edmonton—all at 0.2%. Calgary recorded the smallest increase at 0.1%.

Relative to the fourth quarter of 1992, Vancouver continued to show the largest increase at 2.6%, followed by Halifax (+1.3%)—although Halifax's index level continued to be the lowest at 110.2 in the fourth quarter of 1993—and Ottawa (+1.2%). Indexes for the other four cities fell below the composite index change of +1.1%: Toronto (+1.0%), Montréal (+0.4%), Edmonton (+0.2%), and Calgary (0.0).

The composite index was only 0.2% higher than in the second quarter of 1989 and was 4.9% below the peak of 127.5 recorded in the second quarter of 1990. Removal of the Federal Sales Tax from the index in the first quarter of 1991, concurrent with implementation of the Goods and Services Tax, and removal of the Quebec Provincial Sales Tax in the third quarter of 1992 have had a downward effect on the index. Although the net impact of these tax changes is difficult to quantify, non-residential construction price series over the last three years have recorded very little inflationary pressure. Contractors have consistently reported intense competition in bidding jobs over this period of time.

**Available on CANSIM: matrices 2042 and 2043.**

The fourth quarter 1993 issue of *Construction Price Statistics* (62-007, $18/$72) will be available in March. See "How to Order Publications".

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

**Non-residential construction price indexes**
(1986 = 100)

| | Relative Importance | Fourth Quarter 1992 | Third Quarter 1993 | Fourth Quarter 1993 | Fourth Quarter 1992 to Fourth Quarter 1993 | Third Quarter 1993 to Fourth Quarter 1993 |
|---|---|---|---|---|---|---|
| | | | | | % change | |
| **Composite** | **100.0** | **121.3** | **122.3** | **122.6** | **1.1** | **0.2** |
| Halifax | 2.1 | 108.8 | 109.6 | 110.2 | 1.3 | 0.5 |
| Montréal | 19.3 | 111.4 | 111.7 | 111.9 | 0.4 | 0.2 |
| Ottawa | 8.1 | 125.9 | 127.1 | 127.4 | 1.2 | 0.2 |
| Toronto | 40.1 | 124.7 | 125.6 | 125.9 | 1.0 | 0.2 |
| Calgary | 5.0 | 124.0 | 123.9 | 124.0 | 0.0 | 0.1 |
| Edmonton | 6.2 | 125.7 | 125.6 | 125.9 | 0.2 | 0.2 |
| Vancouver | 19.2 | 118.8 | 121.4 | 121.0 | 2.6 | 0.4 |

# DATA AVAILABILITY ANNOUNCEMENTS

## Railway Carloadings

Seven-day Period Ending January 21, 1994

The number of railway cars loaded in Canada during the seven-day period increased by 7.8% from the year-earlier period; revenue-freight loaded increased by 8.4% to 4.1 million tonnes.

Piggyback traffic tonnage, which is included in total carload traffic, increased by 12.1% during the same period.

Tonnage of revenue-freight loaded as of January 21, 1994 increased by 3.9% from the previous year.

For further information, contact Angus MacLean (613-951-2528, fax: 613-951-0579), Surface Transport Unit, Transportation Division. ■

## Process Cheese and Instant Skim Milk Powder

December 1993

Production of process cheese in December totalled 6 504 575 kilograms, up 2.0% from November 1993 and up 11.7% from December 1992. Year-to-date production at the end of December 1993 totalled 77 804 754 kilograms, up from 75 838 429 the previous year.

**Available on CANSIM: matrix 188 (series 1.10).**

The December 1993 issue of *Production and Inventories of Process Cheese and Instant Skim Milk Powder* (32-024, $5/$50) will be available shortly. See "How to Order Publications".

For detailed information on this release, contact Peter Zylstra (613-951-3511), Industry Division. ■

## Pack of Processed Mushrooms

1993

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

*Pack of Selected Processed Vegetables* (32-240, $13) will be available shortly. See "How to Order Publications".

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

## Pack of Tomatoes and Tomato Products

1993

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

*Pack of Tomatoes and Tomato Products* (32-237, $13) will be available shortly. See "How to Order Publications".

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

# PUBLICATION RELEASED

**Field Crop Reporting Series No. 1: Stocks of Canadian Grain at December 31, 1993.**
**Catalogue number 22-002**
(Canada: $12/$80; United States: US$14/US$96; Other Countries: US$16/US$112).

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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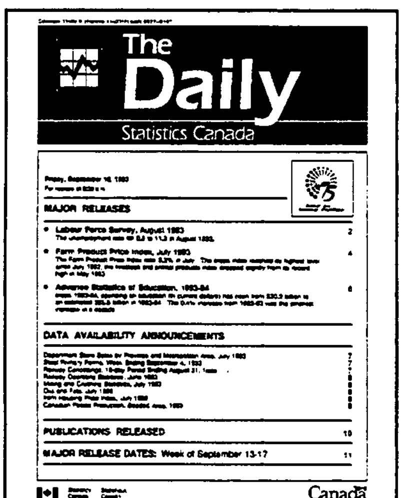
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