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A Weekly Review

Friday, January 31, 2003

INSIDE

◆ Manufacturers' shipments stumble

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◆ Retail trade slumps after spending spree

Retail sales declined 0.6% in November to \$25.8 billion, following a 1.6% gain in October. The automobile and clothing sectors posted significant declines, after a spending spree in the previous month.

◆ Debt load of Canadian businesses stable

Canadian businesses maintained a relatively stable debt load in 2001, despite a decline in the amount owed to domestic banks. Suppliers of financing reported that the aggregate amounts their business clients owed them, as of December 31, 2001, were little changed from year-earlier levels.

◆ Labour market in 2002: Manufacturing was the main source of strength

Job creation in Canada soared 3.7% in 2002, the strongest annual growth rate in 15 years. By the end of the year, employment had jumped 560,000. The rebound in manufacturing was the main source of strength in the labour market. The number of manufacturing jobs jumped by 125,000, or 5.6%, a sharp contrast to the 4.8% decline in 2001.

Canada's inflation rate eases back

Canada's inflation rate retreated to 3.9% in December from an 11-year high of 4.3% in November. The slowdown in the 12-month increase in the Consumer Price Index (CPI) was caused mostly by a drop in the Ontario electricity index.

The energy price index rose 7.1% from December 2001 to December 2002, compared with a 14.0% jump from November 2001 to November 2002. This deceleration was caused mostly by the electricity index for Ontario plummeting 42.0%, as Ontario consumers received a \$75 refund in December 2002. The remaining slowing down effect came from natural gas prices. Gasoline prices were still 20.8% higher than in December 2001, although they fell from November to December 2002.

Important factors contributing to December's 12-month increase in the CPI excluding energy included automotive vehicle insurance premiums, cigarettes, homeowners' replacement cost, rent, purchase of automotive vehicles, and homeowners' insurance premiums. Lower mortgage interest cost moderated the increase in the index.

In December, Alberta registered the largest provincial 12-month increase (+8.3%) in the all-items CPI. A large part of this rise is due to increases of 57.0% in automotive vehicle insurance premiums and of 102.2% in natural gas prices.

(continued on page 2)

Consumer Price Index, December 2002
% change, previous year, not seasonally adjusted

	All items	Food	Shelter	Transportation	Energy
Canada	3.9	2.2	1.2	11.2	7.1
Newfoundland and Labrador	4.9	-0.3	4.3	17.6	11.6
Prince Edward Island	5.7	3.0	2.6	14.5	11.7
Nova Scotia	5.2	2.0	4.8	14.9	17.2
New Brunswick	6.2	2.8	2.8	18.0	13.5
Quebec	3.4	1.0	3.2	9.9	9.7
Ontario	2.8	3.0	-1.7	10.7	-4.0
Manitoba	3.7	2.7	1.2	7.2	10.2
Saskatchewan	4.2	2.1	2.7	7.1	8.5
Alberta	8.3	3.2	9.9	17.6	39.7
British Columbia	3.5	1.9	1.0	9.3	10.9
Whitehorse	3.6	0.5	1.6	9.4	10.6
Yellowknife	4.4	-0.2	5.9	5.4	17.2



Canada's inflation rate... (continued from page 1)

Ontario posted the smallest increase (+2.8%). A 42.0% drop in the electricity index was the main factor explaining the fact that this increase is below the national average.

In 2002, the annual average all-items CPI increased 2.2%, a slightly slower rate of increase than the 2.6% observed for 2001. Excluding energy, the all-items index rose 2.8% on average in 2002, compared with a 2.4% average increase the year before. These increases are almost twice as large as the ones observed from 1996 to 2000, which remained at 1.4% and 1.5%.

Energy prices declined on average 2.0% in 2002, following a 3.3% average increase in 2001 and a substantial 16.2% gain in 2000. Lower energy prices in 2002 were largely the result of an 18.1% drop in natural gas prices. This decrease contrasts with the 29.6% jump in 2001. The only factor moderating these declines was a 7.7% hike in the electricity index.

Among the major components of the CPI, alcoholic beverages and tobacco products contributed the most to the annual average increase in the CPI in 2002. After rising 7.7% in 2001, it climbed 17.6% in 2002. The jump in cigarette prices, induced by hikes in federal and provincial taxes throughout the year, accounted for at least three-quarters of this increase.

Ranking second among the components contributing to the increase in the annual average CPI is transportation, with a rise of 2.8% in 2002, compared with 0.1% in 2001. Food prices rose on average 2.6% in 2002, after climbing 4.5% in 2001.

The shelter index was up 0.9% on average in 2002, following a 3.7% increase in 2001. The strongest upward pressures in 2002 came from electricity, homeowners' replacement cost and rent. However, drops in natural gas prices and mortgage interest cost partly neutralized these increases.

The only downward pressure on the All-items annual average index came from the clothing and footwear component (-0.8%).

After adjustment for seasonal variations, the All-items CPI edged down 0.2% from November to December, following an increase of 0.5% in November. The leading factor contributing to this downward movement was the drop in the shelter index (-1.2%), pushed down by the \$75 refund to electricity consumers of Ontario.

From December 2001 to December 2002, core inflation — excluding the eight most volatile components as defined by the Bank of Canada — rose 2.7%, a decrease from 3.1% in November. The drop in Ontario's electricity index accounted for much of this deceleration.

*The December 2002 issue of **The Consumer Price Index** (Internet: 62-001-XIB, \$8/\$77; paper: 62-001-XPB, \$11/\$103) is now available. For more information, contact Rebecca McDougall (1-866-230-2248; 613-951-9606) or Joanne Moreau (613-951-7130), Prices Division. (See also "Current trends" on page 7.)*

Statistics: Power from data!

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Statistics: Power from data! is now available on Statistics Canada's website (www.statcan.ca). From the Learning resources page, select Students, or select Reference material on the Teachers page. For more information, contact Joe Anne Legge (613-951-6788), Dissemination Division, or your local education representative (1-800-263-1136; education@statcan.ca).

Manufacturers' shipments stumble

Manufacturing shipments declined 1.3% to \$43.6 billion in November, the lowest level since June. Coupled with rising finished-product inventories and lower unfilled orders, the manufacturing sector has lost some momentum in recent months.

In November, 14 of 21 manufacturing industries representing 82% of total shipments posted decreases. November's decline in shipments was mainly concentrated in the durable goods sector, a key indicator of business and consumer confidence. Manufacturers of durable goods fell back 1.6% to \$25.0 billion, the lowest level since March. The non-durable goods sector also reported a decrease (-0.8%), the first since February.

Ontario led the seven provinces and territories that reported decreases in November. Shipments in Ontario declined 1.6% from October. Manufacturers in New Brunswick contracted output by 10.6%, and Quebec reported a decrease of 0.8%.

November's drop in shipments contrasts with manufacturers' performance for the year as a whole. In 2002, record low interest rates, strong growth in the labour market and higher levels of disposable income had consumers racing to acquire new homes and automobiles. From January to November, shipments were 1.6% above the same period of 2001.

So far in 2002, Canadian manufacturers outperformed their counterparts in the United States. From January to November, US shipments declined 1.3% from the same period of 2001. Manufacturers in the United States continued to scale back their inventory holdings. US inventories fell 0.3% to \$427.8 billion, the lowest level since March 1997.

Following an upbeat start to 2002, the motor vehicle industry slowed markedly in recent months. In November, manufacturers reduced shipments of motor vehicles 4.7% to \$5.4 billion, the lowest level since March. Shipments of petroleum and coal products fell 6.5% to \$2.8 billion in November.

Slightly offsetting the decline in shipments for November were increases in the paper (+2.4%) and motor vehicle parts (+2.3%) industries.

Manufacturers' shipments, November 2002 Seasonally adjusted

	\$ millions	% change, previous month
Canada	43,581	-1.3
Newfoundland and Labrador	198	6.5
Prince Edward Island	111	-8.9
Nova Scotia	747	-1.2
New Brunswick	1,016	-10.6
Quebec	10,135	-0.8
Ontario	23,336	-1.6
Manitoba	971	1.1
Saskatchewan	603	-0.8
Alberta	3,559	1.6
British Columbia	2,899	-0.7
Yukon, Northwest Territories and Nunavut	5	-16.2

A significant increase in manufacturers' finished-product inventories boosted total inventories 1.0%, the largest monthly gain in two years. Inventories were \$63.4 billion in November, the highest level in 14 months.

Mounting inventories and a sharp decline in shipments boosted the inventory-to-shipment ratio to 1.46, its highest level since March.

Unfilled orders edged down 0.2% in November, following declines in October and September. Orders decreased to \$46.9 billion, the lowest level since July. Manufacturers reported 0.9% fewer new orders in November, wiping out October's modest gain.

*The November 2002 issue of the **Monthly Survey of Manufacturing** (Internet: 31-001-XIB, \$15/\$147) is now available. For general information, contact the dissemination officer (1-866-873-8789; 613-951-9497; manufact@statcan.ca). For analytical information, contact Russell Kowaluk (613-951-0600; kowarus@statcan.ca), Manufacturing, Construction and Energy Division. (See also "Current trends" on page 7.)*

Canada's international transactions in securities

Foreign investors bought \$5.0 billion of Canadian securities in November, their largest investment in a year. They added to their holdings of both debt securities and equities. Foreign investors increased their holdings of Canadian stocks by \$1.0 billion in November, ending two months of reductions totalling \$1.5 billion.

Canadian demand for foreign securities strengthened in November; the \$5.7 billion investment was the second highest so far in 2002. Canadian investors made their largest investment in foreign stocks in eight months with a \$2.4 billion investment in November.

*The November 2002 issue of **Canada's international transactions in securities** (Internet: 67-002-XIE, \$14/\$132) is now available. For more information, contact Donald Granger (613-951-1864), Balance of Payments Division.*

Retail trade slumps after spending spree

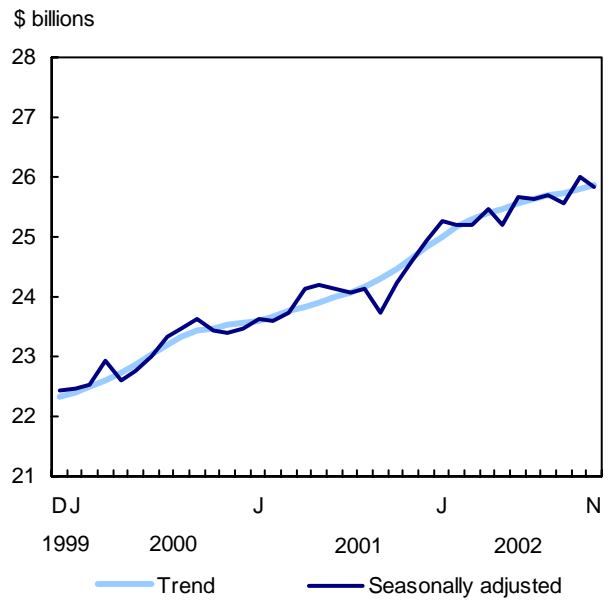
Retail sales declined 0.6% in November to \$25.8 billion, following a 1.6% gain in October. The automobile and clothing sectors posted significant declines, after a spending spree in the previous month.

Despite little growth since the start of 2002, the level of consumer spending in retail stores was exceptionally strong in the first 11 months of the year. Retail sales rose 2.2% from January to November, the weakest growth in the first 11 months of the year since 1995. Nevertheless, cumulative sales for the first 11 months of 2002 were 6.3% above those in the same period of 2001.

In November, motor and recreational vehicle dealers posted a 2.7% decline in sales, reflecting a drop in the number of new motor vehicles sold in that month. Year-to-date sales at the end of November stood 9.1% above those for the same period of 2001, the largest 11-month year-to-date gain in five years.

Lower spending in women's, men's and shoe stores led to a 1.0% sales decline in the clothing sector in November. This followed a 4.5% sales gain in October, which ended three months

Retail sales



Retail sales, November 2002

Seasonally adjusted

	\$ millions	% change, previous month	% change, previous year
Canada	25,827	-0.6	5.1
Newfoundland and Labrador	424	0.1	0.0
Prince Edward Island	111	-0.7	2.0
Nova Scotia	763	-1.5	2.0
New Brunswick	597	-1.6	-0.9
Quebec	5,917	-0.8	6.5
Ontario	9,717	-0.7	4.8
Manitoba	887	-0.7	3.0
Saskatchewan	754	-0.9	5.5
Alberta	3,169	-0.5	6.2
British Columbia	3,391	0.0	5.2
Yukon	34	-2.7	-4.0
Northwest Territories	44	3.0	16.4
Nunavut	19	9.5	16.1

of depressed sales in this sector. Clothing stores showed little growth over the first 11 months of 2002. Year-to-date sales were 3.1% higher than in the same 11-month period of 2001.

Retail sales were weak in all provinces in November. Consumers reduced their retail purchases in eight provinces, and spent about the same amount in Newfoundland and Labrador and British Columbia.

Year-to-date retail sales performance was strongest in the Prairies (+8.0%) and weakest in the Atlantic provinces (+4.2%). Retail sales growth in the first 11 months of 2002 compared with the same period of 2001 fluctuated around the national average in Quebec (+6.6%), British Columbia (+5.9%) and Ontario (+5.7%).

*The November 2002 issue of **Retail trade** (Internet: 63-005-XIB, \$16/\$155) is now available. For general information, contact Client Services (1-877-421-3067; 613-951-3549; retailinfo@statcan.ca). For analytical information, contact Paul Gratton (613-951-3541; paul.gratton@statcan.ca), Distributive Trades Division.*

Monthly Survey of Large Retailers

Sales in November for the group of large retailers were up 6.0% from November 2001 to \$8.1 billion. Every major commodity group posted gains in November, with the exception of a small decrease in hardware and lawn and garden product sales.

The strongest gain in November was seen in the health and personal care products category, which was up 15.0% from November 2001. The other goods and services category posted the second strongest year-over-year gain among the major commodity groups in November (+10.9%).

For general information, contact Client Services (1-877-421-3067; 613-951-3549; retailinfo@statcan.ca). For analytical information, contact Elton Cryderman (613-951-0669; elton.cryderman@statcan.ca), Distributive Trades Division.

Debt load of Canadian businesses stable

Canadian businesses maintained a relatively stable debt load in 2001, despite a decline in the amount owed to domestic banks, the major suppliers of debt financing.

Suppliers of financing reported that the aggregate amounts their business clients owed them, as of December 31, 2001, in the form of loans, mortgages and lines of credit were little changed from the year-earlier level of \$367.3 billion. Lease amounts outstanding increased 10.0% to \$21.6 billion.

Debt owed to domestic banks as of December 31, 2001, fell to \$201.5 billion from \$207.3 billion in 2000. Offsetting this decline were increases from all other types of suppliers except insurance companies. Finance companies reported \$39.8 billion in debt outstanding, a 7.8% increase from 2000, and portfolio managers, venture capital companies and financial funds had \$9.8 billion outstanding, up 18.7%.

Domestic banks accounted for 55.0% of total debt outstanding to businesses, down from 56.4% in 2000. Even so, they continued to be the largest suppliers of debt financing to businesses across all authorization sizes, all provinces and most industries. The next largest supplier, insurance companies, held 13.4%, down from 14.0% in 2000.

In 2001, total debt outstanding declined 1.2% for authorizations above \$1 million, but rose 2.9% for authorizations of less than \$1 million. Amounts outstanding rose 1.2% for authorizations of less than \$50,000, 3.8% for those from \$50,000 to \$249,999, and 2.6% for the \$250,000 to \$999,999 category.

The growth in amounts outstanding reported by finance companies, portfolio managers, venture capital companies and financial funds drove the rise in the smaller categories. These

Debt outstanding, December 31, 2001

	Amount \$ billions	Share %
Total	366.6	100.0
Domestic banks	201.5	55.0
Insurance companies	49.1	13.4
Other banks	40.7	11.0
Finance companies	39.8	10.9
Credit unions and <i>caisses populaires</i>	24.5	6.7
Managers, funds and venture capital companies	9.8	2.7
Leasing companies	1.1	0.3

suppliers are more active in the smaller markets. In contrast, domestic banks and especially insurance companies, which experienced declines in total debt outstanding, are focussed more on authorizations of \$1 million and more.

Lease amounts outstanding went up 10.0% to \$21.6 billion in 2001 from the year-earlier level of \$19.6 billion. Strong increases were reported by finance companies (+15.7%) and domestic banks (+14.3%). Leasing companies reported a \$221 million (-5.7%) decrease in lease amounts outstanding.

Finance companies and leasing companies accounted for 96.0% of lease amounts outstanding in the smallest size category (authorizations of less than \$50,000) in 2001. Domestic banks accounted for 46.9% of lease amounts outstanding in the largest size category (\$1 million and more).

For more information, contact Sri Kanagarajah (613-951-1132; sri.kanagarajah@statcan.ca) or Mike Paju (613-951-1522; mike.paju@statcan.ca), Industrial Organization and Finance Division.

Canadian Tobacco Use Monitoring Survey

The prevalence of smoking continues to decline overall, according to the latest results of the Canadian Tobacco Use Monitoring Survey. In the first half of 2002, an estimated 5.4 million people — 21% of the population aged 15 and older — smoked either daily or occasionally.

Smoking rates for youth have begun to fall in recent years, and the results in the first half of 2002 continued to support this trend: 22% of teens aged 15 to 19 reported that they smoked, down from 28% in 1999. The prevalence of smoking among young adults aged 20 to 24 has also recently been declining, down to 31% from 35% in 1999. However, this age group still has the highest smoking rate of any age group.

Once again, the lowest smoking rates were in British Columbia and Ontario, where about 17% and 19% of those aged 15 and older were smokers, respectively. The highest rates were in Quebec (27%) and in Newfoundland and Labrador (25%).

For more information about the survey results, contact Jirina Vlk (613-957-2988; jirina_vlk@hc-sc.gc.ca), Health Canada, or visit the Tobacco Control Programme website (www.gosmokefree.ca/ctums). For information on the public-use microdata file, contact Client Services (1-800-461-9050; 613-951-3321; fax: 613-951-4527; ssd@statcan.ca), Special Surveys Division.

Labour market in 2002: Manufacturing was the main source of strength

Job creation in Canada soared 3.7% in 2002, the strongest annual growth rate in 15 years. By the end of the year, employment had jumped 560,000.

The dramatic labour market performance last year exceeded the expectations of the Organisation for Economic Co-operation and Development, which had forecast employment growth in Canada at 1.3%, later revised to 1.6%. On an annual average basis, employment actually increased 2.2% in 2002.

Canada's gross domestic product increased 4.0% from the third quarter of 2001, when the economy was at its low point for that year, to the third quarter of 2002. Consumer and government spending maintained the strong pace of 2001. Although business spending remained slow, housing and exports picked up considerably.

The rebound in manufacturing was the main source of strength in the labour market. The number of manufacturing jobs jumped by 125,000, or 5.6%, a sharp contrast to the decline of 112,000, or 4.8%, in 2001.

The gains were widespread, but the largest increases occurred in food processing and machinery production. Employment in food processing was up 23,000, or 9.8%, and machinery manufacturing gained 19,000, or 16.6%.

Although it ended the year on a negative note, the automotive sector helped drive the upward trend in manufacturing for much of 2002.

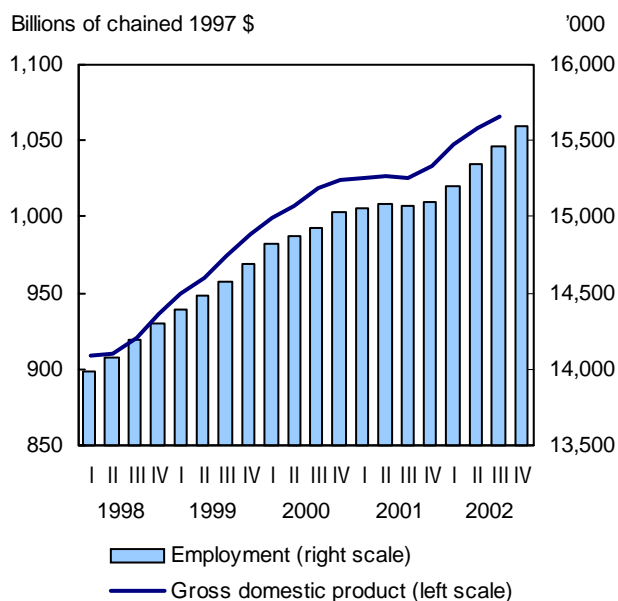
Employment for adult women jumped 244,000, or 4.2%, in 2002. By the end of the year, the unemployment rate for adult women had declined from 6.4% to 6.1%.

Women made strong gains in all areas of the health care and social assistance industry. By the end of 2002, the number of female nurses had increased 21,000, a gain of almost 10%.

Gains in manufacturing and construction had a major impact on employment among adult men, which rose by 211,000 overall, or 3.1%. This drove the unemployment rate for adult men down from 7.3% to 6.7%.

About 47% of the increase occurred in manufacturing or construction. Job gains in construction amounted to 62,000, or

Economic growth and employment in 2002



7.4%. The housing boom led to some significant spin-off employment in furniture manufacturing and retailing, building material retailing, real estate sales, and banking.

Employment increased in every province except Newfoundland and Labrador last year. Ontario and Quebec accounted for almost two-thirds of the total increase of 559,600.

At the end of the year, employment was up significantly in both provinces — 3.3% in Ontario and 4.8% in Quebec. In December, 60.3% of the population in Quebec was employed, the highest proportion since at least 1976.

Employment growth was also strong in British Columbia (+4.2%), mostly in the lower mainland area; Alberta (+3.9%), where over half the gains were in the Edmonton area; and Saskatchewan (+5.5%), which had the fastest rate of growth among the provinces.

For further reading, see the article “2002 — A good year in the labour market” in the January 2003 online edition of *Perspectives on labour and income* (Internet: 75-001-XIE, \$5/\$48). For more information, contact Geoff Bowlby (613-951-3325; geoff.bowlby@statcan.ca), Labour Statistics Division.

Perspectives on labour and income

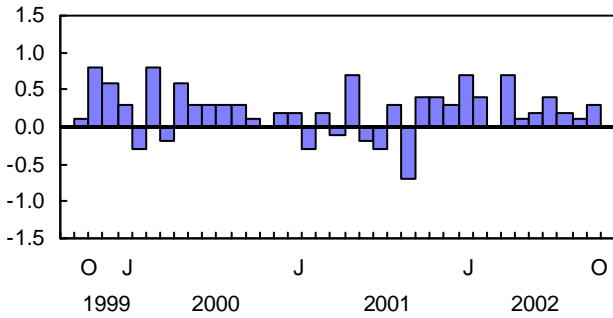
The January 2003 online edition of *Perspectives on labour and income* features three articles. “2002 — A good year in the labour market” details the dramatic improvement in the labour market over the past year in most industries and in most provinces. “Profiling RRSP contributors” takes a timely look at RRSPs in an examination of some personal and family characteristics associated with the likelihood of contributing. Completing the issue is “2000 income: An overview,” an update on how families fared in 2000 from the standpoint of income.

The January 2003 online edition of *Perspectives on labour and income* (Internet: 75-001-XIE, \$5/\$48) is now available. For more information, contact Henry Pold (613-951-4608; henry.pold@statcan.ca), Labour and Household Surveys Analysis Division

Current trends

Gross domestic product

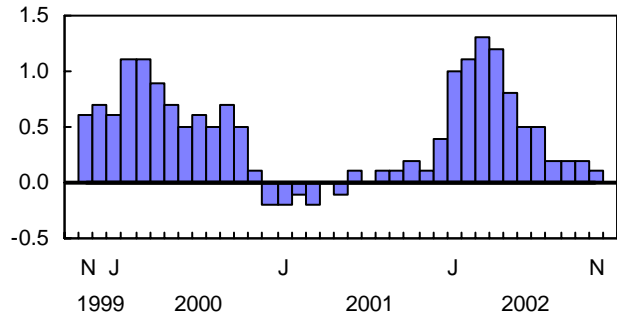
% change, previous month



Total economic activity edged up 0.3% in October, following a 0.1% increase in September.

Composite Index

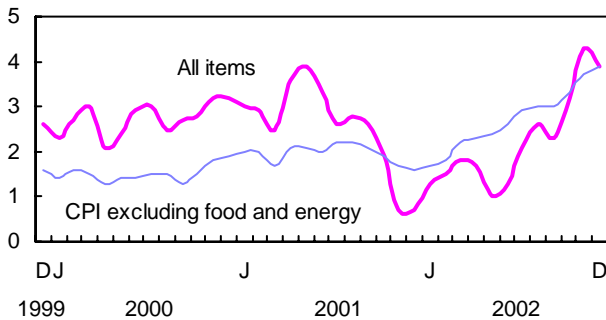
% change, previous month



The leading indicator continued to grow slowly in November, up 0.1% after three straight monthly increases of 0.2%.

Consumer Price Index

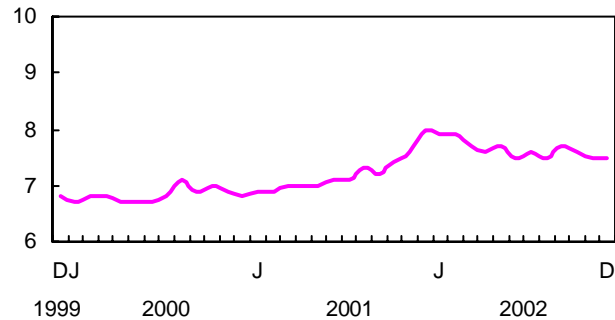
% change, previous year



Consumer prices for goods and services were 3.9% higher in December than they were a year earlier. Excluding food and energy, prices also rose 3.9%.

Unemployment rate

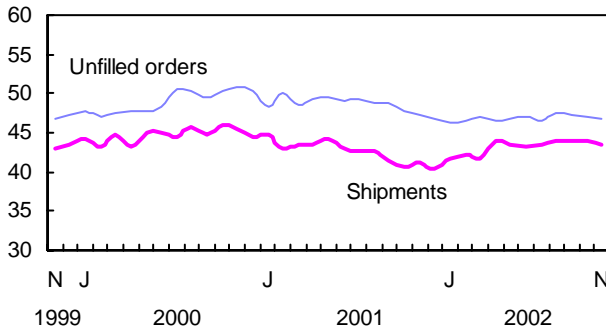
%



In December, the unemployment rate was unchanged at 7.5%.

Manufacturing

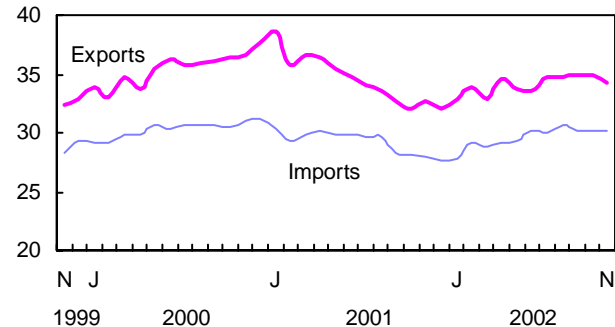
\$ billions



Manufacturers' shipments declined 1.3% in November to \$43.6 billion. The backlog of unfilled orders declined 0.2% to \$46.9 billion.

Merchandise trade

\$ billions



In November, the value of merchandise exports declined 2.2% to \$34.3 billion. Imports edged down 0.1% to \$30.2 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	October	984.1	0.3%	3.9%
Composite Index (1992=100)	December*	180.6	0.4%	7.9%
Operating profits of enterprises (\$ billions)	Q3 2002	40.3	2.6%	12.9%
Capacity utilization rate (%) ²	Q3 2002	83.3	0.8†	2.5†
DOMESTIC DEMAND				
Retail trade (\$ billions)	November	25.8	-0.6%	5.1%
New motor vehicle sales (thousands of units)	November	140.9	-4.7%	-2.6%
Wholesale trade (\$ billions)	November	35.9	0.3%	8.8%
LABOUR				
Employment (millions)	December	15.6	0.4%	3.7%
Unemployment rate (%)	December	7.5	0.0†	-0.5†
Participation rate (%)	December	67.5	0.2†	1.2†
Average weekly earnings (\$)	November*	684.76	0.31%	2.05%
Help-wanted Index (1996=100)	December	113.5	-4.0%	-10.5%
Regular Employment Insurance beneficiaries (in thousands)	November*	550.5	-1.1%	-1.6%
INTERNATIONAL TRADE				
Merchandise exports (\$ billions)	November	34.3	-2.2%	5.0%
Merchandise imports (\$ billions)	November	30.2	-0.1%	7.8%
Merchandise trade balance (all figures in \$ billions)	November	4.1	-0.8	-0.6
MANUFACTURING				
Shipments (\$ billions)	November	43.6	-1.3%	5.8%
New orders (\$ billions)	November	43.5	-0.9%	6.8%
Unfilled orders (\$ billions)	November	46.9	-0.2%	-1.1%
Inventory/shipments ratio	November	1.46	0.04	-0.07
PRICES				
Consumer Price Index (1992=100)	December	120.4	-0.3%	3.9%
Industrial Product Price Index (1997=100)	December*	108.2	-0.4%	2.8%
Raw Materials Price Index (1997=100)	December*	118.4	4.2%	17.6%
New Housing Price Index (1992=100)	November	112.5	0.6%	5.0%

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.

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A weekly review

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Calendar of key releases: February 2003

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