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Releases

Business Conditions Survey: Manufacturing industries

October 2007

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Although they remained positive in the fourth quarter of 2007, manufacturers were more guarded as they continued to face important labour shortages, coupled with ongoing pressures caused by the Canadian dollar reaching parity with the US greenback.

The Business Conditions Survey is a quarterly survey that requests manufacturers' opinions on production impediments, finished product inventory levels, new and unfilled order levels, and production and employment prospects in the coming three months. This voluntary survey was conducted in the first two weeks of October and attracted over 3,000 responses from manufacturers.

Manufacturers' outlook on production prospects weakens

In October, the proportion of manufacturers stating they would increase production over the next three months stood at 25%, up 3 points from July. This was largely offset by 23% of manufacturers stating they would decrease production, which was up from 15% in July. As a result, the balance of opinion stood at +2, a decrease of 5 points from the previous survey. Although lower, this was the third consecutive positive balance in 2007. Continuing positive production prospects were posted in Newfoundland and Labrador, Prince Edward Island, Nova Scotia, Ontario, Manitoba and Saskatchewan, while opinions in the remaining provinces were negative.

Producers in transportation equipment, machinery and electric equipment, appliance and components industries were the major contributors to the positive balance. In all, 10 of the 21 manufacturing industries posted a positive balance for production prospects in the fourth quarter of 2007.

The balance of opinion was determined by subtracting the proportion of manufacturers who expected production would be decreasing in the coming three months from the proportion who expected production would be increasing.

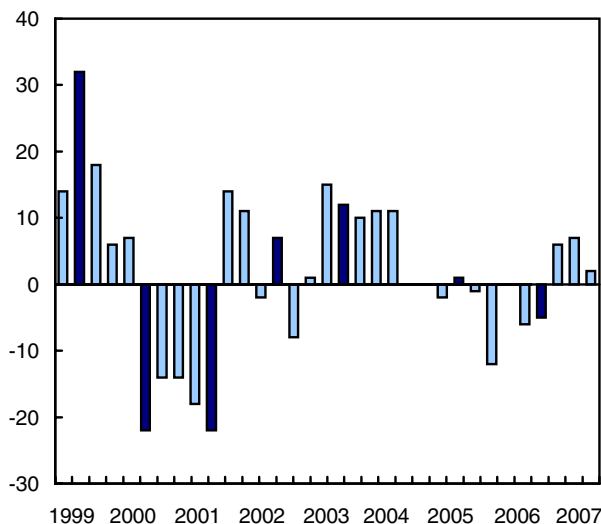
Note to readers

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 over 3,000 manufacturers, and are weighted by manufacturers' shipments or employment. Consequently, larger manufacturers have a correspondingly larger impact on the results than smaller manufacturers.

Except for the data on production difficulties, data in this release are seasonally adjusted.

Balance of opinion for expected volume of production for the next three months

Balance of opinion



Satisfaction with level of new orders down

In October, the balance of opinion concerning current levels of new orders dropped 9 points from the July survey to -3. The proportion of manufacturers who stated that orders received were declining edged up 3 points to 22% in October. In contrast, those stating new orders were rising fell 6 points to 19% in October. Although negative, the balance of opinion remains higher than the -13 posted one year earlier in the October 2006 survey. Producers in primary metal, paper, wood, and computer and electronics products industries were the major contributors to the lowered balance of opinion for orders received. According to August's Monthly Survey of Manufacturing, new orders

for all manufacturing industries dropped 5.0% from July to just under \$51.2 billion.

Manufacturers less satisfied with levels of unfilled orders

In October, 76% of manufacturers described the backlog of unfilled orders as normal, a 6 point increase from July. The October balance of opinion declined an additional 4 points to -9, largely due to a smaller proportion of manufacturers (8%) indicating that the current level of unfilled orders was higher than normal. Meanwhile, 17% reported a lower than normal backlog, comparable to the previous two quarters. Producers in the wood and paper industries were the major contributors to the negative unfilled orders balance of opinion. With the exception of the April survey, the balance of opinion for unfilled orders has been negative since October 2004, reaching a low of -23 in April 2005. According to August's Monthly Survey of Manufacturing, unfilled orders posted a slight decrease of 0.1% to almost \$54.9 billion, the first decline in 12 months. Currently, the backlog of orders stands \$13.6 billion higher than that of the same month one year ago.

Manufacturers slightly less concerned with finished product inventories

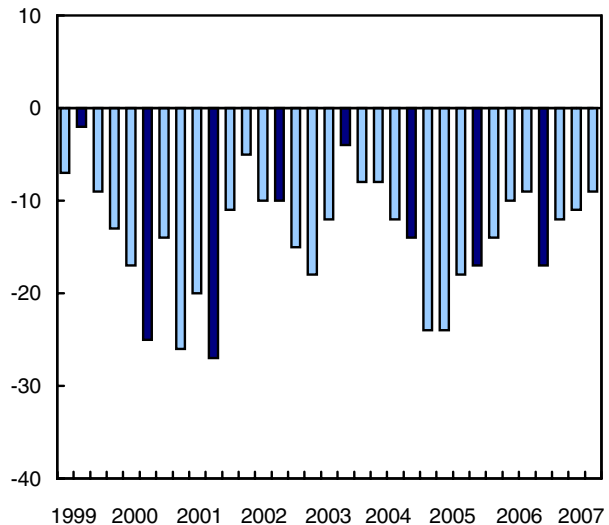
In October, 83% of manufacturers reported that the current level of finished product inventories was about right, up 3 points from July. Some 13% stated that inventories were too high, while 4% said inventories were too low. This left the balance of opinion at -9, a 2 point improvement from the July balance. According to August's Monthly Survey of Manufacturing, finished product inventories stood at over \$22.4 billion, down 1.4% from the almost \$22.8 billion posted one year earlier in the August 2006 survey.

Manufacturers' employment prospects remain unchanged

The October balance of opinion for employment prospects for the next three months remained unchanged from the July survey at +1. Some 64% of manufacturers stated that they would keep their current workforce, 18% indicated they would increase it, and 17% indicated that they expected to decrease employment in the fourth quarter of 2007. Regionally, negative balances in Quebec (-2) and Ontario (-9) were offset by positive balances in the remaining provinces, where many manufacturers continued to experience difficulty in finding skilled labour. According to the September Labour Force Survey, over the first nine months of 2007, manufacturing employment declined 3.7% to just under 2.04 million.

Balance of opinion for current level of finished-product inventory

Balance of opinion



More manufacturers frustrated by production impediments

The proportion of manufacturers reporting production impediments jumped 8 points to 36% in the October survey. The main concerns cited were labour shortages, and the high value of the Canadian dollar. Most of the increase in concern related to skilled labour shortage, which jumped to 16% in October from 11% in July. Manufacturers in Manitoba (42%), Saskatchewan (58%) and Alberta (48%) continued to express the greatest concerns regarding skilled labour shortages.

Available on CANSIM: tables 302-0007 and 302-0008.

Definitions, data sources and methods: survey number 2152.

Business Conditions Survey data for January 2008 will be released on January 29.

For more information or to order data, contact the dissemination officer (toll-free 1-866-873-8789; 613-951-9497; fax: 613-951-9499; manufact@statcan.ca). To enquire about the concepts, methods or data quality of this release, contact Claude Robillard (613-951-3507; claudio.robillard@statcan.ca), Manufacturing, Construction and Energy Division.

□

Business Conditions Survey: Manufacturing industries production prospects balance of opinion for select industries

	October 2006	January 2007	April 2007	July 2007	October 2007
	Seasonally adjusted				
Major group industries					
Non-durable goods	1	12	3	10	-11
Food	13	18	19	7	2
Chemical products	9	2	-5	15	2
Petroleum and coal products	57	11	-3	-10	-31
Paper	-13	19	8	-5	-17
Plastic and rubber products	-25	-25	-6	5	-11
Durable goods	-10	-1	6	2	15
Transportation equipment	-10	-19	4	16	25
Primary metal	-22	15	13	-26	4
Wood products	-12	-6	-9	0	-10
Fabricated metal products	-10	8	3	5	4
Machinery	1	-2	-2	-10	11
Computer and electronic products	-18	-24	19	-4	-33

Business Conditions Survey: Manufacturing industries

	October 2006	January 2007	April 2007	July 2007	October 2007
	Seasonally adjusted				
Volume of production during the next three months compared with the last three months will be:					
About the same (%)	62	59	62	62	52
Higher (%)	16	18	22	22	25
Lower (%)	22	23	16	15	23
Balance of opinion	-6	-5	6	7	2
New orders are:					
About the same (%)	67	52	66	56	59
Rising (%)	10	25	22	25	19
Declining (%)	23	22	11	19	22
Balance of opinion	-13	3	11	6	-3
Present backlog of unfilled orders is:					
About normal (%)	71	68	68	70	76
Higher than normal (%)	5	11	16	13	8
Lower than normal (%)	24	21	16	18	17
Balance of opinion	-19	-10	0	-5	-9
Finished product inventory is:					
About right (%)	81	77	78	80	83
Too low (%)	5	3	5	5	4
Too high ¹ (%)	14	20	17	16	13
Balance of opinion	-9	-17	-12	-11	-9
Employment during the next three months will:					
Change little (%)	65	66	68	67	64
Increase (%)	15	15	17	17	18
Decrease (%)	20	19	15	16	17
Balance of opinion	-5	-4	2	1	1
	Unadjusted				
	%				
Sources of production difficulties					
Working capital shortage	3	2	2	2	3
Skilled labour shortage	10	11	12	11	16
Unskilled labour shortage	6	4	4	4	6
Raw material shortage	4	4	4	4	5
Other difficulties	4	2	7	8	5
No difficulties	72	77	71	72	64

1. No evident seasonality.

Study: The soybean, a Canadian agricultural success story

Since successful breeding efforts in the 1970s made it possible to grow soybeans beyond southern Ontario, soybean area has increased eightfold, and this crop has become an economic success for farmers. Today's inaugural release from the 2006 edition of *Canadian Agriculture at a Glance* reviews the progress of this crop.

The online analytical article, "The soybean, agriculture's jack-of-all-trades, gains ground across Canada", is the first in a series that will eventually appear in the 2006 print edition of *Canadian Agriculture at a Glance*. Statistics Canada publishes *Canadian Agriculture at a Glance* every five years to showcase Census of Agriculture data. When the 2006 print publication is released in 2009, it will contain more than 30 analytical articles.

Farmers reported to the 2006 Census of Agriculture that they grew soybeans on just over 1.2 million hectares, a nearly eightfold increase since 1976. That was the year that varieties were introduced that could perform well in Canada's shorter-season growing areas. Until then, climate restricted soybeans primarily to southern Ontario.

In spite of a 4.1% drop in area between the 2001 and 2006 Censuses of Agriculture, Ontario was still by far the leader in soybean production in 2006, accounting for nearly three-quarters (73%) of Canada's soybean area, just over 872,400 hectares. Quebec placed second in terms of planted area, with 178,161 hectares.

However, it was the growth in soybean area between 2001 and 2006 in the Prairie Provinces that was particularly notable, according to today's report. Manitoba's soybean area increased sevenfold to just over 141,800 hectares, while Saskatchewan's increased sixfold to just over 2,200 hectares. Area in Alberta was about half that in Saskatchewan.

Although soybeans remain far behind canola and wheat as Canada's top cash field crop, in Ontario they were the most valuable field crop in 2006, generating \$547 million and eclipsing the receipts from corn (\$449 million) and wheat (\$275 million).

Nationally, farmers' cash receipts from canola amounted to \$2.5 billion in 2006, about 3.5 times the \$680 million soybean crop. In comparison, farm cash receipts for wheat (excluding durum) amounted to \$1.8 billion, potatoes, \$899 million, and corn, \$753 million.

The report chronicles the multitude of uses driving the demand for this versatile crop, from livestock feed to food-grade oils and soy foods such as soy milk, tofu and natto. It also highlights the crop's industrial uses, from plastics, fibres, lubricants and chemicals to biodiesel. Part of the Canadian soybean breeding program has focused on premium-priced beans tailored for the human food market.

In spite of placing seventh in world soybean production, Canada is a vigorous participant in soybean trade. Of the estimated 3.5 million tonnes of soybeans grown in Canada in the 2006 crop year, over 40%, or 1.5 million tonnes, were exported.

Japan led the list of overseas buyers in 2006, importing \$138 million in Canadian soybeans. Malaysia was a distant second (\$52 million), followed by the Netherlands (\$49 million) and Iran (\$43 million).

Definitions, data sources and methods: survey number 3438.

The analytical article, "The soybean, agriculture's jack-of-all-trades, is gaining ground across Canada" (96-325-XWE, free), part of the 2006 edition of *Canadian Agriculture at a Glance*, is now available from the *Publications* module of our website.

For more information, or to enquire about the concepts, methods, or data quality of this release, contact Erik Dorff (613-951-2818), Agriculture Division. □

Census of Agriculture tracks growth in soybean area

	2006	2001	1996	1991	1986	1981	1976
	hectares						
Canada	1,202,098	1,082,547	876,901	598,454	387,156	282,914	153,793
Newfoundland and Labrador	0	0	0	0	0	0	0
Prince Edward Island	4,580	2,813	2,255	2,378	1,911	42	0
Nova Scotia	958	772	502	185	306	78	17
New Brunswick	762	328	566	18	59	21	4
Quebec	178,161	148,070	96,693	25,271	4,395	1,439	240
Ontario	872,455	909,922	776,209	570,228	380,298	278,853	152,910
Manitoba	141,869	20,249	237	50	139	2,299	309
Saskatchewan	2,229	359	x	0	0	69	183
Alberta	1,083	36	429	323	x	110	127
British Columbia	0	0	x	2	x	2	4

x suppressed to meet the confidentiality requirements of the Statistics Act

0 true zero or a value rounded to zero



Payroll employment, earnings and hours

August 2007 (preliminary)

In August, the average weekly earnings of payroll employees (seasonally adjusted) increased \$1.13 from July to \$772.59. The year-to-date growth, calculated as the average of the first eight months of 2007 compared with the average of the same eight months in 2006, was 3.1%.

In Canada's largest industrial sectors, earnings grew for the first eight months of 2007 in manufacturing (+3.6%), health and social assistance (+3.4%), educational services (+0.9%), and retail trade (+0.2%).

Nationally, the number of occupied payroll jobs climbed 16,100 to 14,336,400 in August. Growth among the provinces varied, with Newfoundland and Labrador (+1.7%) and Alberta (+0.4%) recording the strongest gains.

The industrial sectors showing the strongest employment growth in August were mining, oil and gas extraction (+2.0%), and real estate and rental and leasing (+1.5%).

Since December 2006, the biggest gain in payroll jobs has been in construction (+5.2%). Overall, payroll

employment has grown 118,700 payroll jobs since the beginning of the year (+0.8%).

The average hourly earnings for hourly-paid employees was virtually unchanged in August at \$19.01. The average weekly hours for hourly-paid employees was unchanged at 31.2 hours.

Available on CANSIM: tables 281-0023 to 281-0046.

Definitions, data sources and methods: survey number 2612.

Detailed industry data, data by size of enterprise based on employment, and other labour market indicators will be available soon in the monthly publication, *Employment, Earnings and Hours* (72-002-XIB, free).

Data on payroll employment, earnings and hours for September will be released on November 27.

For more information or to order data, contact Client Services (toll-free 1-866-873-8788; 613-951-4090; fax: 613-951-2869; labour@statcan.ca). To enquire about the concepts, methods or data quality of this release, contact Peter Lorenz (613-951-4167), Labour Statistics Division. □

Average weekly earnings (including overtime) for all employees

Industry group (North American Industry Classification System)	August 2006	July 2007 ^r	August 2007 ^p	July to August 2007	August 2006 to August 2007	Year-to-date average 2007 ¹
Seasonally adjusted						
	\$			% change		
Industrial aggregate	749.11	771.46	772.59	0.1	3.1	3.1
Forestry, logging and support	968.21	977.33	971.75	-0.6	0.4	0.5
Mining and oil and gas	1,338.85	1,419.13	1,436.36	1.2	7.3	5.0
Utilities	1,094.86	1,120.60	1,125.39	0.4	2.8	3.0
Construction	897.03	936.71	945.49	0.9	5.4	3.7
Manufacturing	904.67	932.91	935.86	0.3	3.4	3.6
Wholesale trade	880.23	916.09	913.57	-0.3	3.8	4.8
Retail trade	483.54	491.73	493.80	0.4	2.1	0.2
Transportation and warehousing	780.90	801.99	797.29	-0.6	2.1	1.8
Information and cultural industries	941.83	974.50	974.40	0.0	3.5	4.1
Finance and insurance	966.85	999.32	1,006.40	0.7	4.1	3.2
Real estate and rental and leasing	682.96	718.16	713.07	-0.7	4.4	6.0
Professional, scientific and technical services	974.88	978.86	981.35	0.3	0.7	2.2
Management of companies and enterprises	943.23	944.21	963.51	2.0	2.2	-2.5
Administrative and support, waste management and remediation services	598.66	643.57	633.64	-1.5	5.8	8.3
Educational services	801.32	820.11	823.33	0.4	2.7	0.9
Health care and social assistance	676.83	704.77	701.21	-0.5	3.6	3.4
Arts, entertainment and recreation	436.08	454.55	458.07	0.8	5.0	3.5
Accommodation and food services	306.29	322.62	318.53	-1.3	4.0	8.6
Other services (excluding public administration)	589.17	618.44	617.81	-0.1	4.9	5.1
Public administration	946.26	967.41	974.24	0.7	3.0	3.8
Provinces and territories						
Newfoundland and Labrador	685.53	719.81	714.46	-0.7	4.2	3.5
Prince Edward Island	608.59	629.77	631.33	0.2	3.7	4.7
Nova Scotia	662.49	673.20	675.46	0.3	2.0	2.7
New Brunswick	680.04	705.41	707.04	0.2	4.0	3.7
Quebec	714.01	726.06	735.29	1.3	3.0	3.0
Ontario	782.21	802.96	803.94	0.1	2.8	2.7
Manitoba	677.06	704.91	707.85	0.4	4.5	4.2
Saskatchewan	692.24	723.96	719.44	-0.6	3.9	3.7
Alberta	801.62	837.12	834.45	-0.3	4.1	4.5
British Columbia	736.22	763.26	762.05	-0.2	3.5	2.6
Yukon	847.72	888.21	882.62	-0.6	4.1	2.5
Northwest Territories ²	960.88	1003.61	984.40	-1.9	2.4	1.6
Nunavut ²	924.29	1000.35	973.18	-2.7	5.3	5.1

^r revised

^p preliminary

1. Rate of change for the first eight months of 2007 compared with the same months in 2006.

2. Data not seasonally adjusted.

Number of employees

Industry group (North American Industry Classification System)	December 2006	June 2007	July 2007 ^r	August 2007 ^p	June to July 2007	July to August 2007	December 2006 to August 2007
Seasonally adjusted							
	thousands				% change		
Industrial aggregate	14,217.7	14,281.5	14,320.3	14,336.4	0.3	0.1	0.8
Forestry, logging and support	57.5	56.1	56.0	54.8	-0.2	-2.1	-4.7
Mining and oil and gas	186.8	187.2	190.7	194.5	1.9	2.0	4.1
Utilities	121.0	123.0	123.4	123.9	0.3	0.4	2.4
Construction	752.6	782.6	785.0	791.4	0.3	0.8	5.2
Manufacturing	1,832.2	1,802.3	1,798.2	1,797.4	-0.2	0.0	-1.9
Wholesale trade	750.1	756.9	757.4	759.1	0.1	0.2	1.2
Retail trade	1,754.6	1,787.4	1,798.0	1,803.3	0.6	0.3	2.8
Transportation and warehousing	639.7	648.2	657.6	656.5	1.5	-0.2	2.6
Information and cultural industries	353.9	353.0	355.9	356.7	0.8	0.2	0.8
Finance and insurance	615.7	625.2	629.1	633.2	0.6	0.7	2.8
Real estate and rental and leasing	246.4	247.3	250.3	254.0	1.2	1.5	3.1
Professional, scientific and technical services	714.4	724.4	724.4	728.9	0.0	0.6	2.0
Management of companies and enterprises	97.4	97.3	97.4	98.6	0.1	1.2	1.2
Administrative and support, waste management and remediation services	706.0	713.6	716.3	716.7	0.4	0.1	1.5
Educational services	1,061.4	1,068.6	1,070.4	1,083.7	0.2	1.2	2.1
Health care and social assistance	1,456.8	1,473.8	1,480.5	1,484.8	0.5	0.3	1.9
Arts, entertainment and recreation	239.5	237.8	238.1	236.6	0.1	-0.6	-1.2
Accommodation and food services	1,028.0	1,041.6	1,041.4	1,051.8	0.0	1.0	2.3
Other services (excluding public administration)	517.8	523.1	525.1	526.6	0.4	0.3	1.7
Public administration	815.3	817.3	818.2	823.5	0.1	0.6	1.0
Provinces and territories							
Newfoundland and Labrador	177.6	182.0	181.5	184.5	-0.3	1.7	3.9
Prince Edward Island	57.0	57.6	57.8	57.9	0.3	0.2	1.6
Nova Scotia	386.0	386.6	388.1	388.1	0.4	0.0	0.5
New Brunswick	309.4	301.4	301.5	302.4	0.0	0.3	-2.3
Quebec	3,260.6	3,270.9	3,275.3	3,280.1	0.1	0.1	0.6
Ontario	5,455.3	5,476.8	5,486.9	5,490.3	0.2	0.1	0.6
Manitoba	530.2	535.6	538.3	538.6	0.5	0.1	1.6
Saskatchewan	419.4	422.3	424.8	425.4	0.6	0.1	1.4
Alberta	1,709.8	1,721.3	1,726.4	1,733.2	0.3	0.4	1.4
British Columbia	1,852.3	1,877.3	1,885.7	1,885.3	0.4	0.0	1.8
Yukon	17.2	17.5	17.8	17.9	1.7	0.6	4.1
Northwest Territories ¹	22.7	24.1	24.1	24.6	0.0	2.1	8.4
Nunavut ¹	10.8	10.9	10.6	10.8	-2.8	1.9	0.0

^r revised

^p preliminary

1. Data not seasonally adjusted.

Production and disposition of tobacco products

September 2007

Total cigarettes sold in September by Canadian manufacturers decreased 14.6% from August to 1.3 billion cigarettes, down 20.6% compared with September 2006.

Cigarette production in September decreased 11.8% from August to 1.4 billion cigarettes, down 25.7% from September 2006.

At 1.7 billion cigarettes, the level of closing inventories for September increased 4.2% from August, up 3.9% from September 2006.

Note: This survey collects data on the production of tobacco products in Canada by Canadian

manufacturers, and the disposition or sales of this production. It does not collect data on imported tobacco products. Therefore, sales information in this release is not a proxy for domestic consumption of tobacco products.

Available on CANSIM: table 303-0062.

Definitions, data sources and methods: survey number 2142.

The September 2007 issue of *Production and Disposition of Tobacco Products*, Vol. 36, no. 9 (32-022-XWE, free), is now available from the *Publications* module of our website.

For more information, or to enquire about the concepts, methods or data quality of this release, contact

the dissemination officer (toll-free 1-866-873-8789; 613-951-9497; manufact@statcan.ca), Manufacturing, Construction and Energy Division. ■

Sawmills

August 2007

Monthly lumber production by sawmills edged down 1.6% to 5 708.1 thousand cubic metres in August.

In August, sawmills shipped 5 910.7 thousand cubic metres of lumber, a decrease of 4.1% from July. Compared with August 2006, lumber shipments fell 8.9%.

Between July and August, stocks dropped 3.1% to 7 854.8 thousand cubic metres.

Available on CANSIM: table 303-0009.

Definitions, data sources and methods: survey number 2134.

The August 2007 issue of *Sawmills*, Vol. 61, no. 8 (35-003-XWE, free), is now available from the *Publications* module of our website.

To order data, to obtain more information, or to enquire about the concepts, methods or data quality of this release, contact the dissemination officer (toll-free 1-866-873-8789; 613-951-9497; manufact@statcan.ca), Manufacturing, Construction and Energy Division. ■

Placement of hatchery chicks and turkey poults

September 2007 (preliminary)

Placements of hatchery chicks onto farms were estimated at 57.6 million birds in September, up 5.4%

from September 2006. Placements of turkey poults on farms increased 8.0% to 2.1 million birds.

Available on CANSIM: table 003-0021.

Definitions, data sources and methods: survey number 5039.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Sandra Gielfeldt (613-951-2505; sandy.gielfeldt@statcan.ca), Agriculture Division. ■

Supply and disposition of refined petroleum products

May 2007

Data on the supply, disposition and domestic sales of refined petroleum products are now available for May.

Available on CANSIM: tables 134-0001 to 134-0004.

Definitions, data sources and methods: survey number 2150.

The May 2007 issue of *The Supply and Disposition of Refined Petroleum Products in Canada*, Vol. 62, no. 5 (45-004-XWE, free), is now available from the *Publications* module of our website.

For more information, or to enquire about the concepts, methods or data quality of this release, contact the Marketing and Dissemination Section (toll-free 1-866-873-8789; 613-951-9497; energ@statcan.ca), Manufacturing, Construction and Energy Division. ■

New products

Production and Disposition of Tobacco Products,
September 2007, Vol. 36, no. 9
Catalogue number 32-022-XWE
(free).

Sawmills, August 2007, Vol. 61, no. 8
Catalogue number 35-003-XWE
(free).

The Supply and Disposition of Refined Petroleum Products in Canada, May 2007, Vol. 62, no. 5
Catalogue number 45-004-XWE
(free).

Broadcasting and Telecommunications, Vol. 37,
no. 1
Catalogue number 56-001-XIE
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31	Gross domestic product by industry	August 2007
1	Film and video distribution	2005
2	Labour Force Survey	October 2007