



The Daily

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MAJOR RELEASES

- **Monthly Survey of Manufacturing, February 2003** 2
 In February, manufacturers reported a 0.9% decline in shipments, while inventories continued to accumulate and unfilled orders decreased for the sixth consecutive month.
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OTHER RELEASES

- Travel between Canada and other countries, February 2003 7
 - Crushing statistics, March 2003 8
 - Deliveries of major grains, March 2003 9
 - Primary iron and steel, February 2003 9
 - Annual Survey of Architectural Services Industry, 2001 9
 - Annual Survey of Consumer Goods Rental and Leasing Services, 2001 10
 - Overcoming distance, overcoming borders: Comparing North American regional trade 10
-

- NEW PRODUCTS** 12
-



MAJOR RELEASES

Monthly Survey of Manufacturing

February 2003

In February, manufacturers reported a 0.9% decline in shipments, while inventories continued to accumulate and unfilled orders decreased for the sixth consecutive month. Global uncertainty continued to negatively impact the Canadian manufacturing sector.

Following a gangbuster January, manufacturers of motor vehicles pulled back moderately in February, contributing to the overall decline in shipments. February's decrease would have been larger, but was offset by soaring petroleum and coal product prices. Geopolitical unrest in various regions of the world and uncertainty regarding access to adequate supplies of petroleum products led to record-high petroleum and coal product prices in recent months.

Excluding the motor vehicle and parts industries and the price-inflated shipments of the petroleum and coal products industry, shipments fell back 1.3% in February. Overall, 16 of 21 industries, representing 68% of total shipments, posted decreases in February.

Durable goods manufacturers pull down shipments

February's decline was entirely concentrated in the durable goods sector, a key indicator of consumer and business confidence. Shipments decreased 2.0% to \$24.8 billion, the fourth decline in the last five months. Meanwhile, rising petroleum prices contributed to a 0.6% increase in shipments of non-durable goods in February.

Shipments in Ontario decline the most

Seven provinces and all territories reported lower shipments in February. The motor vehicle industry largely contributed to the \$500 million decrease (-2.1%) in Ontario's shipments, leading all provinces. The primary metals and computer industries also contracted in Ontario. New Brunswick (-\$40.8 million, -3.6%) and British Columbia (-\$28.2 million, -1.0%) rounded out the top three declining provinces.

The petroleum and coal products industry boosted shipments in Quebec and Alberta. Manufacturers in Quebec increased shipments by \$129 million (+1.3%) in February, and shipments in Alberta rose \$79.6 million (+2.1%). The food industry largely contributed to a \$23.7 million boost (+2.4%) to Manitoba's manufacturing activity.

Note to readers

In addition to current-month estimates, data for the previous three months are regularly revised. Factors influencing revisions include late receipt of company data, incorrect information reported earlier, replacement of estimates with actual figures (once available), and seasonal adjustments. Consult the appropriate CANSIM tables for revised data.

Non-durable goods industries include food, beverage and tobacco products, textile mills, textile product mills, leather and allied products, paper, printing and related support activities, petroleum and coal products, chemicals, and plastic and rubber products.

Durable goods industries include clothing, wood products, non-metallic mineral products, primary metals, fabricated metal products, machinery, computer and electronic products, electrical equipment, appliances and components, transportation equipment, furniture and related products, and miscellaneous manufacturing.

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

New orders are those received whether shipped in the current month or not. They are measured as the sum of shipments for the current month plus the change in unfilled orders. Some people interpret new orders as orders that will lead to future demand. This is inappropriate since the "new orders" variable includes orders that have already been shipped. Readers should take note that the month-to-month change in new orders may be volatile. This will happen particularly if the previous month's change in unfilled orders is closely related to the current month's change.

Not all orders will be translated into Canadian factory shipments because portions of large contracts can be subcontracted out to manufacturers in other countries.

Shipments by province and territory

	Jan. 2003	Feb. 2003	Jan. to Feb. 2003
Seasonally adjusted			
	\$ millions		% change
Newfoundland and Labrador	194	176	-9.2
Prince Edward Island	104	103	-1.6
Nova Scotia	770	768	-0.2
New Brunswick	1,147	1,107	-3.6
Quebec	10,288	10,418	1.3
Ontario	23,789	23,289	-2.1
Manitoba	979	1,002	2.4
Saskatchewan	625	603	-3.5
Alberta	3,749	3,828	2.1
British Columbia	2,888	2,860	-1.0
Yukon, Northwest Territories and Nunavut	6	5	-17.8

Manufacturers cut jobs in March

According to the latest results of the Labour Force Survey (March 2003), factory jobs have declined

in five of the last seven months. In March, there were 37,000 fewer manufacturing jobs, wiping out February's gains (+21,000). The manufacturing losses in March were in automotive and plastics, as well as in food and wood products.

Automobile manufacturing falls back

Shipments of motor vehicles edged back 2.4% to \$5.3 billion in February, after January's 15.1% surge. In January, several motor vehicle manufacturers returned to higher production levels following extended shutdowns at some assembly plants in the previous two months.

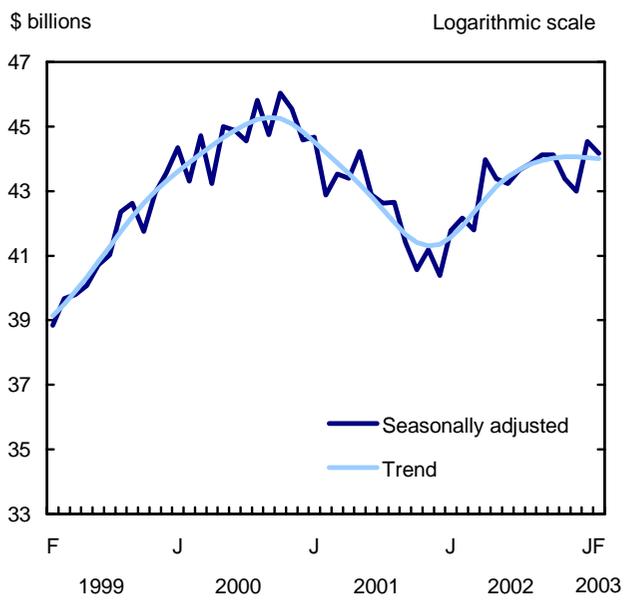
February marked the sixth decrease in the last seven months for shipments of motor vehicles. Softening consumer demand for automobiles (particularly in the United States), rising retail inventories and some apprehension concerning the future prospects of car sales in 2003 have contributed to the gradual slowdown in shipments since mid-2002. The trend for shipments of motor vehicles has been negative for seven consecutive months.

Manufacturers of primary metals and railroad rolling stock also reported decreases in February. Shipments of primary metals fell 2.1% to \$2.9 billion, losing some of the ground gained in December (+5.6%). Recent volatility in the railroad rolling stock industry contributed to a 19.4% drop in production this month. Production was \$219 million in February, an 11-month low.

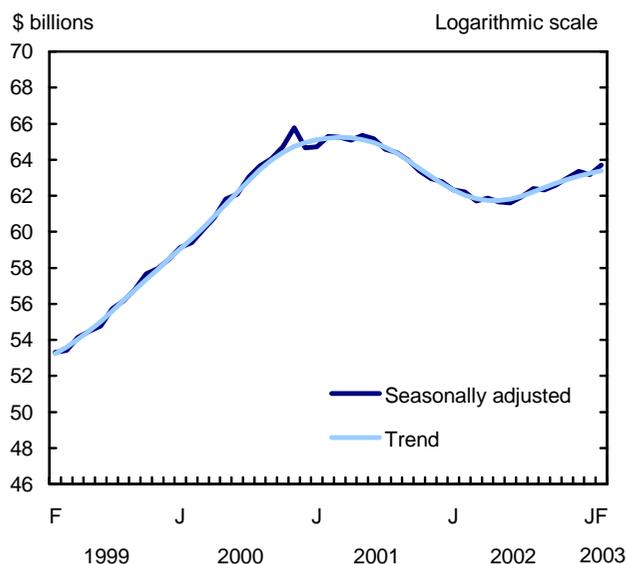
Soaring petroleum prices partly offset February's decline

Escalating prices pushed Canadian shipments of petroleum and coal products to a new high in February. Shipments of petroleum and coal products jumped 5.9% to \$3.4 billion, offsetting some of the decline in total manufacturing shipments this month. International concerns for adequate supplies of petroleum products coupled with political conflicts in various regions of the world have contributed to significant unease in the energy sector. Prices for petroleum and coal products have soared 16% in the first two months of 2003.

Shipments fall back in February



Inventories rise for the fourth time in the last five months



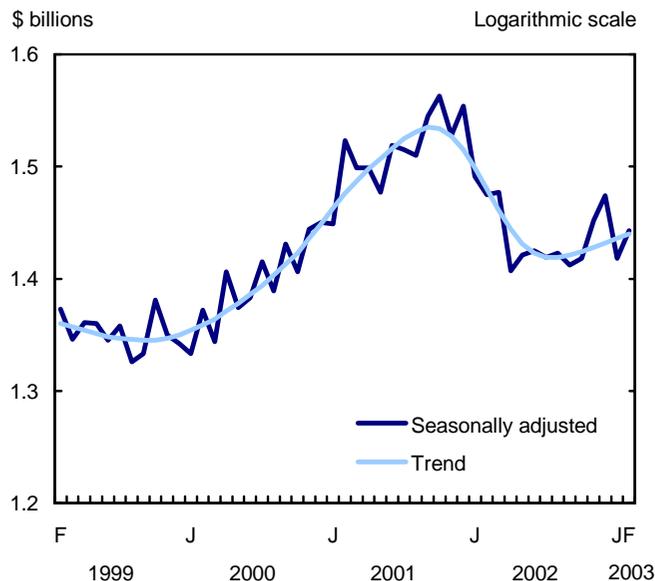
In addition to finished-product inventories, raw material and goods-in-process inventories also increased in February. Raw material inventories rose 0.5%, making up for January's drop (-0.5%). Meanwhile, goods-in-process inventories increased 1.1% to \$16.1 billion, the highest level since August 2002.

The main contributor to the increase in inventories was the chemical products industry. Rising industrial prices for chemicals and petroleum products contributed to a 3.4% rise in chemical product inventories to \$5.8 billion.

The inventory-to-shipment ratio edges up

Rising inventories boosted the inventory-to-shipment ratio to 1.44 in February from 1.42 in January. In December, the ratio had climbed to 1.47, a nine-month high. A higher ratio may indicate some difficulty by manufacturers to clear inventories as a result of weak demand.

The inventory-to-shipment ratio moves up in February



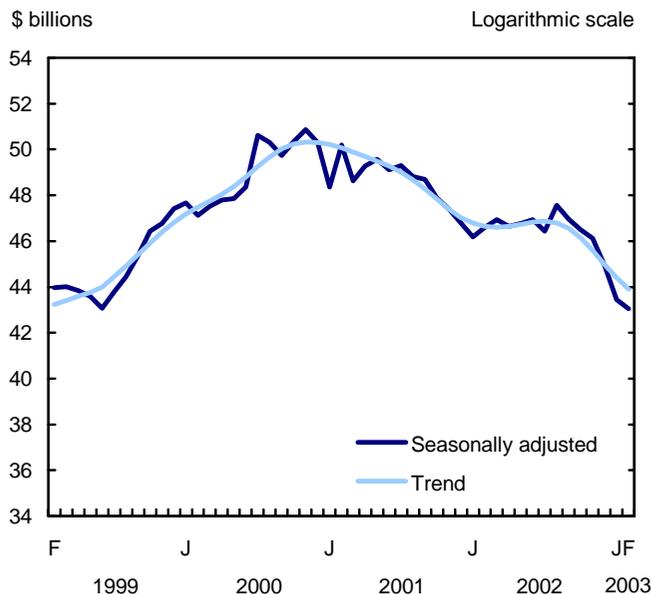
The finished-product inventory-to-shipment ratio also edged up in February, rising to 0.45 from 0.44 in January. The ratio is a measure of the time that would be required in order to exhaust finished-product inventories if shipments were to remain at their current level.

Unfilled orders decline once again

February marked the sixth straight monthly decline in unfilled orders. Orders fell 0.9% to \$43.0 billion, the lowest level since January 1999.

Continuing weakness in the aerospace products and parts industry largely contributed to February's drop. Aerospace orders fell 3.4% to \$14.2 billion, the seventeenth decrease in a row. Concerns about terrorism, the threat of war in Iraq and a significant downturn in business travel have all contributed to a slump in the global aviation sector. Excluding the aerospace products and parts industry, unfilled orders rose 0.3%.

Unfilled orders remain weak



Telecommunications manufacturers also reported a decline in unfilled orders in February. Unfilled orders of computer and electronic products fell 4.6% to \$4.0 billion, the lowest level since May 2002 and the third decrease in the last four months.

New orders rise to a six-month high

New orders increased for the second month in a row, rising 1.6% to \$43.7 billion, a six-month high. Machinery and transportation equipment manufacturing reported sizable new orders on the books in February.

Available on CANSIM: tables 304-0014 and 304-0015.

Information on methods and data quality available in the Integrated Meta Data Base: survey number 2101.

The February 2003 issue of the *Monthly Survey of Manufacturing* (31-001-XIE, \$15/\$147) will be available soon. See *How to order products*.

Data for shipments by province in greater detail than normally published may be available on request.

All data are benchmarked to the 1998 Annual Survey of Manufactures.

For general information or to order data, contact the dissemination officer (1-866-873-8789; 613-951-9497; fax: 613-951-9499; manufact@statcan.ca). To enquire about the concepts, methods or data quality of the release, contact Russell Kowaluk (613-951-0600; kowarus@statcan.ca), Manufacturing, Construction and Energy Division.

□

Shipments, inventories and orders in all manufacturing industries

	Shipments		Inventories		Unfilled orders		New orders		Inventory-to-shipment ratio
	Seasonally adjusted								
	\$ millions	% change	\$ millions	% change	\$ millions	% change	\$ millions	% change	
February 2002	42,168	0.9	62,213	-0.2	46,596	0.9	42,586	3.4	1.48
March 2002	41,803	-0.9	61,724	-0.8	46,931	0.7	42,137	-1.1	1.48
April 2002	43,982	5.2	61,861	0.2	46,641	-0.6	43,693	3.7	1.41
May 2002	43,380	-1.4	61,657	-0.3	46,761	0.3	43,500	-0.4	1.42
June 2002	43,228	-0.3	61,612	-0.1	46,933	0.4	43,400	-0.2	1.43
July 2002	43,649	1.0	61,958	0.6	46,440	-1.1	43,156	-0.6	1.42
August 2002	43,851	0.5	62,407	0.7	47,556	2.4	44,968	4.2	1.42
September 2002	44,134	0.6	62,320	-0.1	46,963	-1.2	43,541	-3.2	1.41
October 2002	44,132	0.0	62,580	0.4	46,491	-1.0	43,660	0.3	1.42
November 2002	43,385	-1.7	62,989	0.7	46,127	-0.8	43,021	-1.5	1.45
December 2002	42,997	-0.9	63,357	0.6	44,927	-2.6	41,796	-2.8	1.47
January 2003	44,538	3.6	63,162	-0.3	43,454	-3.3	43,065	3.0	1.42
February 2003	44,157	-0.9	63,702	0.9	43,045	-0.9	43,748	1.6	1.44

Manufacturing industries except motor vehicle, parts and accessories

	Shipments		Inventories		Unfilled orders		New orders	
	Seasonally adjusted							
	\$ millions	% change	\$ millions	% change	\$ millions	% change	\$ millions	% change
February 2002	33,969	-0.4	58,798	-0.2	45,007	1.0	34,398	2.9
March 2002	33,955	-0.0	58,362	-0.7	45,299	0.6	34,247	-0.4
April 2002	35,103	3.4	58,431	0.1	44,970	-0.7	34,774	1.5
May 2002	35,058	-0.1	58,179	-0.4	45,046	0.2	35,135	1.0
June 2002	34,865	-0.6	58,174	0.0	45,234	0.4	35,052	-0.2
July 2002	34,846	-0.1	58,383	0.4	44,707	-1.2	34,319	-2.1
August 2002	35,261	1.2	58,914	0.9	45,663	2.1	36,218	5.5
September 2002	35,787	1.5	58,808	-0.2	44,932	-1.6	35,056	-3.2
October 2002	35,834	0.1	59,130	0.5	44,532	-0.9	35,434	1.1
November 2002	35,260	-1.6	59,403	0.5	44,195	-0.8	34,923	-1.4
December 2002	35,746	1.4	59,609	0.3	43,072	-2.5	34,623	-0.9
January 2003	36,280	1.5	59,617	0.0	41,633	-3.3	34,841	0.6
February 2003	36,055	-0.6	60,130	0.9	41,258	-0.9	35,680	2.4



OTHER RELEASES

Travel between Canada and other countries February 2003

Travel to Canada fell 3.5% in February, the second consecutive monthly decline after a cumulative 6.8% increase over the previous five months. Although Canadian travel to the United States declined 4.0%, Canadian travel to overseas countries hit a new record high. (Unless otherwise specified, these data are seasonally adjusted.)

In February, the number of travellers from the United States fell 3.5% to an estimated 3.3 million, mostly as a result of noticeable declines in same-day and overnight car travel to Canada. Overnight car trips decreased 4.1% to 880,000 and same-day car trips dropped 5.7% to 1.8 million. During the same period, however, overnight travel by plane from south of the border increased slightly to 308,000 trips (+1.3%).

The number of overseas travellers to Canada also fell, down 3.1% to 345,000. Ten of Canada's top 12 overseas markets showed decreases in same-day and overnight trips to this country in February, with Hong Kong recording the largest monthly decline (-36.4%). France, however, posted a 2.5% increase and the number of travellers from India jumped 28.1% to about 7,300, the second highest monthly figure on record for this country.

Overall, Canadian travel abroad declined 3.5% in February to almost 3.3 million trips, primarily the result of a 4.0% decline in trips to the United States. Like their American neighbours, Canadians took fewer cross-border car trips in February. Overnight car trips fell 2.2% to 619,000 and same-day car trips dropped 3.7% to 1.7 million. However, overnight plane travel increased 1.0% to 357,000 trips.

In addition, Canadians made 425,000 trips to overseas countries. This was a 0.4% increase from January and a new monthly record.

Available on CANSIM: tables 427-0001 to 427-0006.

Information on methods and data quality available in the Integrated Meta Data Base: survey number 5005.

The February 2003 issue of *International travel, advance information*, Vol. 19, no. 2 (66-001-PIE, \$6/\$55) is now available. See *How to order products*.

For general information, contact Client Services (1-800-307-3382; 613-951-7608; fax: 613-951-2909; cult.tourstats@statcan.ca). To enquire about the concepts, methods or data quality of this release, contact Frances Kremarik (613-951-4240; frances.kremerik@statcan.ca), Culture, Tourism and the Centre for Education Statistics. □

Travel between Canada and other countries

	January 2003 ^r	February 2003 ^p	January to February 2003	February 2003	February 2002 to February 2003
	Seasonally adjusted			Unadjusted	
	'000		% change	'000	% change
Canadian trips abroad¹	3,403	3,285	-3.5	2,707	3.4
To the United States	2,979	2,859	-4.0	2,214	0.7
To other countries	424	425	0.4	493	17.6
Same-day car trips to the United States	1,808	1,740	-3.7	1,387	0.6
Total trips, one or more nights	1,503	1,492	-0.8	1,264	7.4
United States ²	1,079	1,066	-1.2	771	1.7
Car	633	619	-2.2	332	-3.0
Plane	354	357	1.0	401	7.7
Other modes of transportation	92	90	-2.9	38	-13.0
Other countries ³	424	425	0.4	493	17.6
Travel to Canada¹	3,761	3,630	-3.5	2,334	-7.5
From the United States	3,405	3,285	-3.5	2,143	-8.2
From other countries	356	345	-3.1	191	1.1
Same-day car trips from the United States	1,920	1,811	-5.7	1,319	-11.3
Total trips, one or more nights	1,710	1,664	-2.7	928	-3.8
United States ²	1,365	1,325	-2.9	740	-5.0
Car	918	880	-4.1	485	-5.4
Plane	304	308	1.3	208	-2.5
Other modes of transportation	143	137	-4.3	47	-10.7
Other countries ³	345	339	-1.9	188	1.1
Most important Overseas markets⁴					
United Kingdom	71	70	-0.8	46	2.9
Japan	38	37	-2.8	18	8.1
France	28	29	2.5	23	12.3
Germany	29	28	-3.5	11	4.5
Mexico	16	15	-3.8	7	24.6
South Korea	15	15	-0.2	9	6.5
Australia	17	14	-12.6	9	6.6
Netherlands	10	10	-4.3	4	5.3
Italy	10	9	-2.7	3	2.1
China	9	9	-1.6	5	14.6
Hong Kong	12	7	-36.4	6	-41.0
India	6	7	28.1	3	63.1

^r Revised figures.

^p Preliminary figures.

¹ Totals exceed the sum of "same-day car trips" and "total trips, one or more nights" because they include all of the same-day trips.

² Estimates for the United States include counts of cars and buses, and estimated numbers for planes, trains, boats and other methods.

³ Figures for other countries exclude same-day entries by land only, via the United States.

⁴ Includes same-day and one or more night trips.

Crushing statistics

March 2003

Oilseed processors crushed 192 041 metric tonnes of canola in March, according to the monthly survey of crushing plants. Oil production totalled 80 268 tonnes and meal production amounted to 119 573 tonnes.

Available on CANSIM: table 001-0005.

The March 2003 issue of *Cereals and oilseeds review* (22-007-XIB, \$11/\$112; 22-007-XPB, \$15/\$149) will be available in May. See *How to order products*.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Les Macartney (613-951-8714; les.macartney@statcan.ca), Agriculture Division.

Deliveries of major grains

March 2003

Data on March grain deliveries are now available.

Available on CANSIM: table 001-0001.

The March 2003 issue of *Cereals and oilseeds review* (22-007-XIB, \$11/\$112; 22-007-XPB, \$15/\$149) will be available in May. See *How to order products*.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Client Services (1-800-465-1991; agriculture@statcan.ca) or Susan Anderson (613-951-3859; sue.anderson@statcan.ca), Agriculture Division. ■

Primary iron and steel

February 2003

Data on primary iron and steel are now available for February.

Available on CANSIM: table 303-0010.

Information on methods and data quality available in the Integrated Meta Data Base: survey numbers, including related surveys, 2116 and 2184.

The February 2003 issue of *Primary iron and steel*, Vol. 58, no. 2 (41-001-XIB, \$5/\$47), is now available. See *How to order products*.

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

Annual Survey of Architectural Services Industry

2001

The architectural services industry generated \$1.5 billion in operating revenues in 2001, up 7.9% from 2000.

The growth was stimulated by a notable turnaround in investment in residential structures, propped up by the hot housing market and low interest rates.

Architectural services companies in Ontario accounted for 48% of total revenues, followed by British Columbia at 17%, Quebec at 14%, and Alberta at 12%.

The industry recorded growth in revenues in all provinces except Saskatchewan (-9.5%) and Manitoba (-5.0%). However, these provinces represented less than 5% of total revenues in 2001.

The industry's operating profit margin was 15.1% in 2001, compared with 15.5% in 2000.

Architectural offices in Quebec had an overall profit margin of 24%, well ahead of the national figure. In Quebec, mostly because of regulatory restrictions, unincorporated proprietorships and partnerships (whose profits include the remuneration accruing to the working business owners) are significantly more prevalent than in other provinces.

Income from fees amounted to \$1.2 billion in 2001, representing 79% of total operating revenues. Full service fees represented 92% of the fee income. The largest source of full service fees was institutional projects at 41%, followed by commercial projects at 27%, and residential projects at 17%. Leisure, industrial and other facilities accounted for the remaining 15% of full-service income.

In 2001, fee income from foreign projects totalled less than \$50 million. Half of these amounts were generated from the United States, and one-third came from Europe. Ontario (62%) and British Columbia (27%) dwarfed other provinces in foreign revenues.

Less than 15,000 people were employed in the industry; of this total, 79% were full-time, 8% were part-time, and 13% were contract workers. Architects (registered and other) accounted for 48% of the workforce, and technical staff made up 33%.

Of the 4,200 architectural establishments in the industry, less than one-fifth had six or more employees. Larger firms were most likely to be in Ontario and least likely to be in Quebec. Architecture remains a significantly local business, with few firms having offices in more than one province.

The architectural services industry is comprised of establishments primarily engaged in planning and designing the construction of residential, institutional, leisure, commercial and industrial buildings and other structures by applying knowledge of design, construction procedures, zoning regulations, building codes and building materials.

Available on CANSIM: table 360-0004.

Information on methods and data quality available in the Integrated Meta Data Base: survey number 2420.

Results from the 2001 Annual Survey of Architectural Services are now available. Detailed tables at the provincial level for a range of industry characteristics providing breakdown of revenues, expenses, and employment are also included in the data release package. To order a free copy, contact Denyse Brazeau (613-951-5634; fax: 613-951-6696; denyse.brazeau@statcan.ca).

For more information, or to enquire about the concepts, methods or data quality of this release, contact Kyoomars Haghandish (613-951-6304; fax: 613-951-6696; kyoomars.haghandish@statcan.ca), Service Industries Division. ■

Annual Survey of Consumer Goods Rental and Leasing Services
2001

The consumer goods rental and leasing industry earned operating revenues of \$2.1 billion in 2001, down 3.6 % from 2000. The operating profit margin for the industry was 6.3% in 2001, compared with 11.7% in 2000.

Results from the 2001 Annual Survey of Consumer Goods Rental and Leasing Services are now available. These data provide information such as the industry's revenue, expenses, salaries, wages and benefits, operating profit margin, and the percentage distribution of operating revenue earned by type of service and client base.

Available on CANSIM: table 352-0010.

Information on methods and data quality available in the Integrated Meta Data Base: survey number 2434.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Marian Grant (613-951-3558; grantma@statcan.ca), Service Industries Division. ■

Overcoming distance, overcoming borders: Comparing North American regional trade

In 1993 — four years after the initial implementation of free trade — Canada had achieved about one-half of its

potential level of trade with the United States, according to a new study.

The study, which measured the integration between the Canadian and US economies through trade, showed that trade between US states in 1993 was on average twice as strong as cross-border trade between the two nations. If Canada had been fully integrated into the US market at the time, cross-border trade would have been on par with trade among US states, after controlling for the size of the economies of provinces and states and the distance between them, among other factors.

The study found that although the border remained a significant barrier to trade, its influence was much less than estimates made by previous studies.

This study is one of the first to effectively compare the entire breadth of inter-regional trade flows in North America, in this case for 1993. It also measures the extent of trade between Canadian provinces.

Tariff and non-tariff barriers to trade still had a substantial effect on Canada-US trade in 1993. The border's effect was weakest for the transportation equipment sector, and the paper products and lumber and wood products sectors. These are sectors in which barriers to trade have been eliminated for a long time, or where Canada has a strong comparative advantage. The border effect was strongest in food products, textiles and apparel sectors, where barriers to trade remained in 1993.

The study also found that the degree of economic integration among provinces was much stronger than among US states. Interprovincial trade was on average six times stronger than interstate trade, after controlling for the economic sizes of provinces and states and the distances between them. For all industrial sectors, interprovincial trade was stronger than interstate trade, all else being held constant. Relative to the United States, Canada is a highly integrated economy.

This finding is explained by the fact that the US economy is much larger and denser than Canada's. For example, California's population and economy are larger than Canada's, and New York and Texas are not far behind.

American firms do not have to look as far to expand their markets as their Canadian counterparts do. As long as the border remains a barrier to trade, Canadian firms will have to trade over long distances to expand their markets or to find the products that they require. The strength of interprovincial trade, compared with interstate trade, is a reflection of this fact.

The economic analysis research paper *Overcoming distance, overcoming borders: Comparing North American trade* (11F0027MIE2003008, free) is

now available on Statistics Canada's website (www.statcan.ca). From the *Our products and services* page, under *Browse our Internet publications*, choose *Free*, then *National accounts*.

Also available on Statistics Canada's website is information on related papers in economic geography (www.statcan.ca/english/studies/eaupdate/geo.htm).

For more information, or to enquire about the concepts, methods or data quality of this release, contact Mark Brown (613-951-7292), Micro-Economic Analysis Division. ■

NEW PRODUCTS

Overcoming distance, overcoming borders: comparing North American regional trade,
Economic analysis research paper no. 8
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(free).

Farming facts, 2002
Catalogue number 21-522-XPE
(free).

Production of eggs, February 2003
Catalogue number 23-003-XIB
(free).

Primary iron and steel, February 2003, Vol. 58, no. 2
Catalogue number 41-001-XIB (\$5/\$47).

International travel, advance information,
February 2003, Vol. 19, no. 2
Catalogue number 66-001-PIE (\$6/\$55).

All prices are in Canadian dollars and exclude sales tax. Additional shipping charges apply for delivery outside Canada.

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Statistics Canada

Thursday, June 5, 1997
For release at 8:30 a.m.

MAJOR RELEASES

- **Urban transit, 1995** 2
Despite the emphasis on taking urban transit, Canadians are using it less and less. In 1996, each Canadian took an average of about six trips on some form of urban transit, the lowest level in the past 25 years.
- **Productivity, hourly compensation and unit labour cost, 1995** 4
Growth in productivity among Canadian businesses was noticeably weak again in 1996, accompanied by sluggish gains in employment and slow economic growth during the year.

OTHER RELEASES

- Map-warmed index, May 1997 3
- Short-term Expectations Survey 8
- Steel primary forms, week ending May 31, 1997 12
- Egg production, Apr. 1997 12

PUBLICATIONS RELEASED 11

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