



Infomat

A Weekly Review

Friday, March 3, 2000

OVERVIEW

◆ Petroleum products boost industrial prices

In January, industrial product prices posted their largest annual increase (+4.4%) in more than four years. Industrial prices were boosted by strong prices for petroleum, primary metals, meat products and chemical products.

◆ Raw material prices: another big yearly increase

Surging oil prices have again been responsible for a substantial increase in raw material prices. In January, manufacturers paid 30.0% more for raw materials than they did a year earlier.

◆ Energy putting upward pressure on consumer prices

In January, consumers faced an annual inflation rate of 2.3%. Energy prices again provided the main upward pressure. Nonetheless, from December to January, consumer price inflation slipped 0.1%.

◆ Average weekly earnings rise moderately

In December, average weekly earnings increased to \$619.91, up 0.9% from November and up from a year earlier by 1.8%, which is below the annual inflation rate in consumer prices.

◆ Foreign investment in Canadian securities at 25-year low

In 1999, foreign investment in Canadian securities was at the lowest level in 25 years, while Canadians invested a record amount in foreign securities for a second straight year.

◆ Spending on plant and equipment levels off

Private and public capital spending is expected to increase by 1.3% to \$176.6 billion in 2000. Housing investment should increase for a fifth year in a row, while investment in plant and equipment will level off.

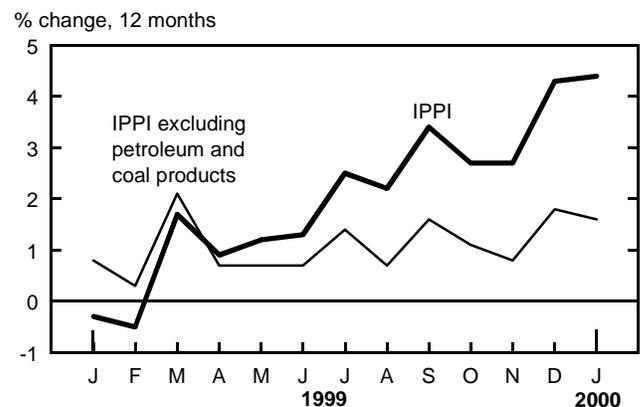
Petroleum products boost industrial prices

In January, industrial product prices climbed 4.4% compared with January 1999. This was the largest yearly increase since December 1995. It was due to the strength of prices for petroleum, primary metals, primary meat products and chemical products. The overall increase was dampened by a stronger Canadian dollar and price declines for motor vehicles. Excluding petroleum and coal products, the Industrial Product Price advanced just 1.6%.

On a monthly basis, industrial product prices remained unchanged. Higher prices for refined petroleum products, primary metal products and primary meat products were counterbalanced by lower prices for motor vehicles. Again, if petroleum and coal products were excluded, overall prices would instead have weakened from December to January by 0.2%.

In the refined petroleum products industry, prices rose from December to January by 3.3%, continuing a string of increases that started in March 1999. Cold weather in the northeastern United States boosted demand. The upward pressure on prices was compounded by signs that OPEC might consider sustaining its production cutbacks beyond the March 31 expiration of its initial

Industrial product price index



(continued on page 2)



... Petroleum products boost industrial prices

agreement. Reflecting the higher prices for crude oil, prices of refined petroleum products in January were up from a year earlier by 61.0%. The impact was also felt at the retail level, where consumers paid 25.3% more at gas pumps in January.

Primary metal products continued along their upward price trend in January, gaining 1.5% compared with December and attaining their highest level since August 1997. Aluminum product prices were the driving force behind this monthly increase. They rose 6.6%, hitting levels last seen in April 1995. Speculation that a possible shortage of the raw material alumina could hinder production in China, the world's fourth largest producer, led to upward pressure on prices at a time of firmer Asian demand. The rise in aluminum product prices was somewhat tempered by a 1.4% slip in nickel prices, the first monthly decline since last June. However, nickel prices were 77.7% higher than in January 1999. The overall strengthening of the metal sector within the past year was reflected in the primary metals category in January, where prices advanced 11.6% on a yearly basis.

Motor vehicle prices lost ground from December to January (-1.9%), restrained by the firmer Canadian dollar. For cars, export prices fell 2.2%, whereas domestic prices rose 1.4%, supported

by reports of robust sales. For trucks, export prices also fell 2.2%, whereas domestic prices were nearly unchanged (-0.4%). Vehicle prices dropped 4.4% from January 1999 to January 2000, once again reflecting the firmer Canadian dollar. Truck prices (-3.6%) fared somewhat better than car prices (-5.2%), owing in part to the popularity of sport-utility vehicles.

Strong pork prices contributed to a 1.8% monthly increase in primary meat product prices. Fuelled by high consumer demand for bacon, pork prices rose a further 7.3% in January on the heels of a 10.5% increase in December. As was also the case in December, the increase was concentrated in the domestic market. Chicken prices, meanwhile, dropped 2.8%. On a yearly basis, the prices of primary meat products gained 9.5%. Pork prices climbed 34.7%, due largely to a 43.1% jump in domestic prices. Export prices were also higher on a yearly basis (+11.8%). These gains were dampened by a 5.7% decline in chicken prices.

Available on CANSIM: matrices 1870-1878.

*The January 2000 issue of **Industry price indexes** (62-011-XPB, \$22 /\$217) will be available at the end of this month. For more information, contact Client Services (613-951-3350; fax: 613-951-1539; infounit@statcan.ca), Prices Division.*

Raw material prices: another big yearly increase

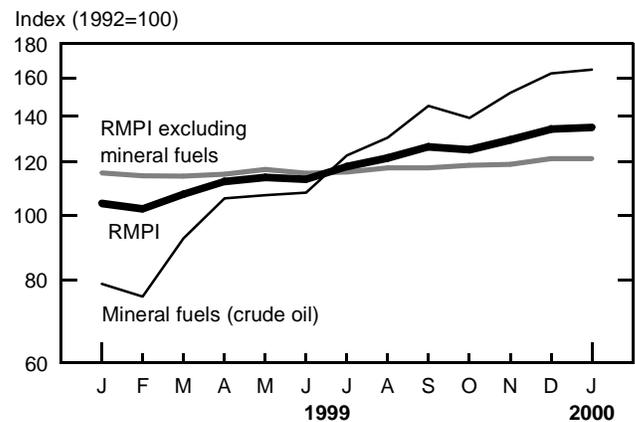
Surging oil prices have again been responsible for a substantial increase in raw material prices. In January, manufacturers paid 30.0% more for raw materials than they did a year earlier. This rate of increase represented a slight deceleration from December's 34.1%. If the mineral fuels category, almost all of which is crude oil, had been excluded in January, the yearly increase in raw material prices would have been just 5.0%.

From December to January, raw material prices rose 0.5%. Almost all of that gain was due to mineral fuel prices. If the mineral fuels category were excluded in January, the price of raw materials would have been unchanged from December.

Between January 1999 and January 2000, mineral fuel prices more than doubled (+109.1%). In Canadian dollars, January's price for crude oil was at its highest level since the Raw Materials Price Index was created in 1981. From December to January, almost all of the increase in mineral fuel prices was due to a 1.3% rise in crude prices. Internationally, crude oil prices in mid-January were at their highest level since the Persian Gulf War in 1991. Contributing to January's increase was an OPEC committee decision that urged member countries to keep production limits in place past their scheduled end-of-March expiration.

Turning to animals and animal products, prices edged down from December to January by 0.5%. A decline in prices for cattle and calves (-3.3%) was almost offset by higher prices for hogs (+4.3%). The price decline for the former may have been a short-term market fluctuation, given that demand for beef remains robust after Canadian herds of beef cattle were reduced last year. As for hogs, the level of production by the Canadian hog industry has remained relatively strong as the demand for hogs has picked up.

Raw materials price index



Pulpwood and softwood logs for milling contributed to a monthly increase in wood prices (+1.2%). Pulpwood prices jumped 2.9%, up to the same level as a year earlier. International pulp inventories are down relative to their level over the last decade. Demand is expected by many to remain strong. Prices of softwood logs for milling edged up 0.8%, bringing the yearly increase to 7.7%. Although the construction of new homes in Canada slowed in January, the value of building permits increased for a third straight month in December. In the United States, building permits for houses showed strong growth.

As for plant products, coffee prices fell from December by 11.1% and were 2.2% below their level in January 1999. These declines followed forecasts of good harvests in Vietnam and Indonesia. Prices for unrefined sugar fell 7.0% from December to

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... Raw material prices: another big yearly increase

land 31.7% lower than a year earlier, with Russia absent as a buyer at a time when world sugar production is generally expected to climb. Soybean prices in January were 5.3% lower than a year earlier, but 8.2% higher than in December. That strong monthly increase followed international concern about dry weather that has damaged the soybean crop in Brazil.

Available on CANSIM: matrix 1879.

The January 2000 issue of *Industry price indexes* (62-011-XPB, \$22 /\$217) will be available at the end of this month. For more information, contact Client Services (613-951-3350; fax: 613-951-1539; infounit@statcan.ca), Prices Division.

Energy putting upward pressure on consumer prices

In January, consumers faced an annual inflation rate of 2.3%. This overall increase in the price level of the goods and services that make up the Consumer Price Index (CPI) was lower than December's 2.6%, but comparable to the increases of 2.2% in November and 2.3% in October.

January's annual inflation rate of 2.3% was in large part due to higher prices for gasoline and household heating (fuel oil and natural gas). Global prices for crude oil have been climbing due to the production quotas agreed to by OPEC countries. January's annual increase in gasoline prices was 25.3%, the second largest

in 12 months. In January, the CPI excluding energy showed an annual inflation rate of 1.1%, its lowest since March 1999.

Other significant contributors to the overall price increase in January were food purchased from restaurants, tuition fees and mortgage interest costs. January's annual increase of 1.7% in mortgage interest costs was the largest since December 1995. The upward price pressure in January was somewhat neutralized by price decreases for computer equipment and supplies and for fresh fruit.

From December to January, consumer price inflation slipped 0.1%. Air transportation prices fell 8.3%, due primarily to seasonal rate decreases for a number of domestic and transatlantic routes. Travel tour prices dropped 9.5%, in keeping with the patterns of previous years. Traditionally, January sees low demand for holiday packages to winter destinations. Vehicle prices dipped 0.9%, a combined result of manufacturer rebates for certain models and dealer discounts to help spur sales.

These monthly declines were only partly offset by price increases for fresh vegetables, non-alcoholic beverages and natural gas. Fresh vegetable prices rose from December by 6.8%. This increase in January was in keeping with previous years, and it was a result of reduced supplies. Monthly prices increased for natural gas by 2.4%. This reflected increases in Ontario, Saskatchewan and British Columbia. The most cited reason was that distributors paid higher costs for their gas purchases.

Available on CANSIM: matrices 9940-9970.

The January 2000 issue of *The consumer price index* (62-001-XPB, \$11/\$103) is now available. For further information, contact Client Services (613-951-9606; fax: 613-951-1539; infounit@statcan.ca), Prices Division. See also "Current trends" on page 8.

Consumer Price Index, January 2000

% change, previous year, not seasonally adjusted

	All items	Food	Shelter	Transportation	Energy
Canada	2.3	-0.3	2.1	5.9	15.0
Newfoundland	3.3	1.7	5.9	6.5	19.0
Prince Edward Island	3.2	-0.2	5.6	6.5	22.1
Nova Scotia	3.5	1.4	6.4	6.2	19.5
New Brunswick	3.1	0.8	3.2	8.7	17.6
Quebec	2.0	-0.9	2.2	5.5	12.7
Ontario	2.4	0.0	1.9	6.1	15.3
Manitoba	2.3	1.8	1.7	4.5	8.4
Saskatchewan	1.5	-0.4	3.1	3.8	10.8
Alberta	2.7	0.4	3.7	6.7	16.2
British Columbia	1.3	-1.1	0.0	6.4	19.0
Whitehorse	1.7	-0.6	2.1	4.4	9.6
Yellowknife	1.3	1.1	2.7	0.5	12.9

Average weekly earnings rise moderately

In December, average weekly earnings for all employees increased to \$619.91, up \$5.45 or (+0.9%) from November and up from a year earlier by 1.8%. Although the pace of growth in average weekly earnings has accelerated since the first quarter of 1999, it still remains below the annual inflation rate shown by the Consumer Price Index, which was 2.6% in December.

At the provincial level, the annual changes in average weekly earnings were moderate. The strongest annual advance occurred in New Brunswick (+4.2%), where earnings gains were widespread by industry. Most of the gains were in the earnings of hourly-paid and salaried employees. In Ontario, relatively strong growth in average earnings also occurred, at 2.1%.

In December, hourly-paid employees (all industries) earned an average \$15.54 per hour, an increase from December 1998 of 1.7%. The growth was strongest in service-producing industries.

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... Average weekly earnings rise moderately

Also for hourly-paid employees, average weekly hours (including overtime) rose 0.3 hours to 31.5 in December. That rise was due in part to an increase in overtime of 0.1 hours.

Payroll employment continued its upward trend in December, increasing by 57,000 employees. Strong increases were seen in manufacturing, construction, trade and business services. Moreover, all the provinces and territories recorded increases in payroll employment. At the national level, employment growth was strong in 1999, when 302,000 employees were added to payrolls between December 1998 and December 1999.

Available on CANSIM: matrices 4285-4466, 4493-4494, 9438-9452, 9639-9664 and 9899-9911.

*The December 1999 issue of **Employment, earnings and hours** (72-002-XPB, \$32/\$320) presents the month's industry data and other labour market indicators in detail. Custom tabulations of the data are available on demand. For further information, contact Jean Leduc (613-951-4090; fax: 613-951-4087; labour@statcan.ca), Labour Division.*

Average weekly earnings, all industries, December 1999 Seasonally adjusted

	\$	% change, previous month	% change, previous year
Canada	619.91	0.9	1.8
Newfoundland	549.64	1.3	1.3
Prince Edward Island	488.87	2.2	-1.1
Nova Scotia	526.20	1.6	1.3
New Brunswick	546.73	0.8	4.2
Quebec	579.58	1.2	1.4
Ontario	663.28	0.9	2.1
Manitoba	556.75	2.4	1.8
Saskatchewan	548.87	0.5	0.3
Alberta	635.77	1.4	1.3
British Columbia	631.55	0.9	1.6
Yukon	703.63	1.5	5.6
Northwest Territories and Nunavut	796.31	0.7	8.9

Foreign investment in Canadian securities at 25-year low

In December, foreign investors reduced their holdings of Canadian securities by \$6.6 billion, more than reversing their \$6.1 billion investment in November. December's sell-off helped to cut overall foreign investment in Canadian securities in 1999 to its lowest level in 25 years.

Foreign investors cut their holdings of Canadian bonds by \$7.1 billion in December, reversing a substantial \$6 billion investment in November. For 1999 as a whole, foreign investment in Canadian bonds totalled only \$3.5 billion, a level not seen since the early 1970s. This decreased foreign investment in

Related market information

In December, short-term interest rates rose faster in the United States than they did in Canada, so the differential favouring investment in the United States climbed above 50 basis points. This differential was the largest since March 1998. The differential on long-term government instruments shifted back to favouring investment in the United States in December by 20 basis points.

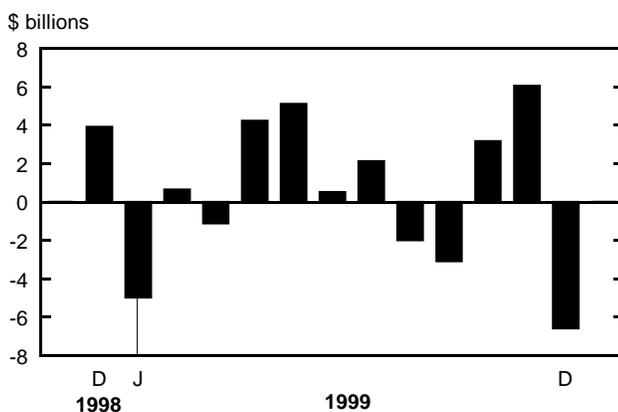
Canadian stock prices (TSE 300 composite index) leaped an amazing 11.8% in December, adding to a 3.7% gain in November. This year-end surge was good enough to outperform American stocks (Standard & Poor's 500 index) by a two-to-one margin over the last two months of 1999.

The Canadian dollar had an excellent year in 1999, gaining a full four cents against the U.S. dollar. A 1.5 cent gain in December pushed the dollar to close at 69.29 U.S. cents, the highest since April 1998.

Canadian bonds occurred against a backdrop of lower borrowing requirements at most levels of government. As well, for most of last year, the differential on long-term government instruments favoured investment in the United States.

Foreigners continued to accumulate Canadian stocks in 1999, with purchases totalling \$0.7 billion. This buying took place against a backdrop of a 29.7% gain in Canadian stock prices in 1999 (TSE 300 composite index). December's buying was enough to reach a record \$14.2 billion for 1999 as a whole, marginally surpassing the previous high in 1998. Although the majority was invested in new issues, foreign investors also acquired \$6.1 billion of outstanding shares during 1999. U.S. investors accounted for all of the foreign buying in 1999, whereas other foreign investors reduced their holdings.

Foreign investment in Canadian securities¹



¹ Includes bonds, stocks and money market paper.

(continued on page 5)

... Foreign investment in Canadian securities at 25-year low

As for Canadian money market paper, negligible foreign selling in December capped a year in which foreign investors reduced their holdings in 10 of the 12 months—down a record \$13.4 billion for the year. This activity was spread over the money market instruments, most notably federal Treasury bills and corporate paper. The selling originated from all geographic areas but was led by the United States, Europe and Asia.

Canadian investors, meanwhile, added a further \$2.5 billion to their holdings of foreign securities in December, and more than four-fifths of it went into stocks. In 1999, this helped to produce, for a second straight year, a record Canadian investment in foreign securities. The total value of the foreign investment reached \$23 billion, up slightly from 1998. Canadians investing in foreign stocks accounted for \$20.5 billion of these outflows. That activity

was heavily influenced by Canadians receiving treasury shares in foreign companies involved in direct investment acquisitions of Canadian companies. Some two-thirds of the investment for the year went into U.S. shares, with the balance being invested in shares on overseas markets.

Canadians also purchased \$0.4 billion of foreign bonds in December, bringing their annual investment in these holdings to \$2.4 billion, roughly split between U.S. Treasuries and overseas bonds.

Available on CANSIM: matrices 2328-2330, 2378-2380 and 4195.

The December 1999 issue of Canada's international transactions in securities (print version: 67-002-XPB, \$18 /\$176; Internet version: 67-002-XIB, \$14 /\$132) will be available shortly. For further information, contact Robert Théberge (613-951-1860), Balance of Payments and Financial Flows Division.

Spending on plant and equipment levels off

In 2000, private and public capital investment including housing is expected to increase by 1.3% to \$176.6 billion. Investment in residential construction should increase for a fifth year in a row, rising 5.1% from 1999 to \$43.0 billion. Investment in plant and equipment should reach \$133.6 billion, a slight 0.1% increase from 1999. This levelling off, which follows six consecutive increases and is accompanied by record high capacity use rates, is partly due to the completion of large capital projects in recent years.

The increased investment in residential construction is mainly due to an expected 6.1% increase for new housing. With mortgage rates at reasonable levels and a generally favourable economic environment, investment in new housing should reach \$19.1 billion. The largest gain is expected in Ontario (+\$1.2 billion), followed by Quebec (+\$474.1 million) and Alberta (+\$144.6 million).

Note to readers

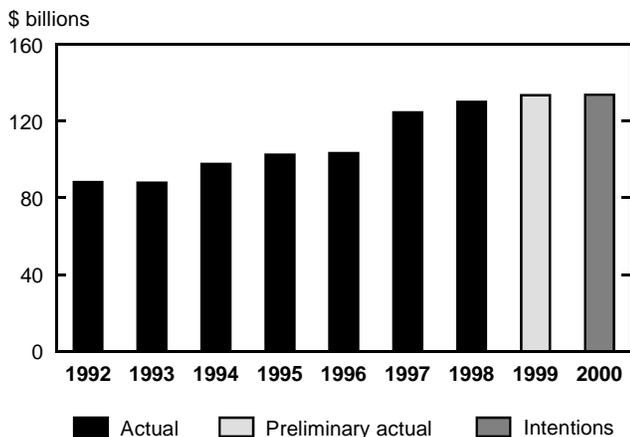
Investment intentions are based on a sample survey of 27,000 businesses, governments and institutions. The survey was conducted from October 1999 to the end of January 2000. It had a 72% response rate. Data in this article are calendarized and expressed in current dollars.

As for plant and equipment, investment in machinery and equipment is expected to decline 3.7% to \$71.8 billion in 2000, whereas spending on non-residential construction is expected to increase 5.0% to \$61.8 billion. Even though expenditures on plant and equipment will remain unchanged overall, there will be a huge resurgence in spending by the oil and gas extraction industries, where the recovery in oil prices since the last quarter of 1999 has doubled drilling activity compared with the same period in 1999. Investment in oil and gas wells should accordingly rise 17.3% to \$17.8 billion.

Offsetting this rebound is a decline in pipeline construction (due to the ending of several large projects) and a continuing decline in the number of vehicles acquired by leasing companies for the coming year. The winding down of several pipeline projects across the country means that capital spending in the pipeline industry will tumble 47.0% to \$2.2 billion in 2000. Automotive leasing companies' investment in machinery and equipment for lease is expected to decline 11.4% in 2000, a drop of \$1.3 billion. This marks the second consecutive year of lower expectations, and it coincides with the upward trend in auto sales.

After a period of unprecedented investment in machinery and equipment between 1994 and 1998, manufacturing investment is expected to be flat again in 2000. The capital spending intentions of motor vehicle manufacturers are expected to fall 36.3%, as retooling for new models is wound up at several plants. Chemical manufacturer's spending intentions are down 27.1% due to the completion of plant expansions. On the other hand, increased spending is expected by refiners (+40.0%), paper manufacturers (+21.0%) and 10 other industries.

Plant and equipment spending



(continued on page 6)

... Spending on plant and equipment levels off

Among governments, an expected 5.8% investment increase to \$14.4 billion will come from the municipal level. Local governments plan to boost their capital spending by 12.5% to \$8.4 billion. Much of this increase in spending is expected to benefit the transportation infrastructure.

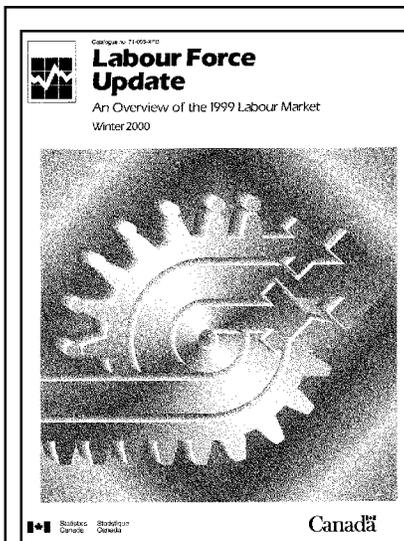
In percentage terms, the Northwest Territories and Prince Edward Island are expected to lead all other regions in investment growth in 2000, with spending rising by 10.0% and 8.0%

respectively. Ontario and Alberta expect increases of 3.6% each. The largest decline is expected in Nova Scotia (-21.4%).

Available on CANSIM: matrices 11500-11537.

Private and public investment in Canada, Intentions 2000 (61-205-XIB, \$35) will be available shortly. For further information, contact Les Shinder (613-951-2030; 1 877 338-2368; shinder@statcan.ca) or Gilbert Paquette (613-951-9818; 1 800 571-0494; gilbert@statcan.ca), Investment and Capital Stock Division.

New from Statistics Canada



Labour force update: An overview of the 1999 labour market Winter 2000

This issue of *Labour force update* provides an in-depth summary of the 1999 labour market. Using revised estimates from the Labour Force Survey (LFS), this overview looks at employment growth: where it occurred across the country, in which industries and who benefited from the new jobs. A variety of charts and tables further demonstrate trends and recent labour market occurrences. This issue includes an article explaining the extensive revisions the LFS has undergone.

Each quarter, *Labour force update* features the latest information and relevant trends relating to a particular labour market issue. Informative commentary, charts and analytical tables provide concise and up-to-date information and is a useful starting point for further research.

The Winter 2000 issue of *Labour force update* (71-005-XPB, \$29/\$96) is now available. You can also visit "In depth" on Statistics Canada's Web site at www.statcan.ca. For more information, contact Jeannine Usalca (613-951-4720; fax: 613-951-2869; usaljea@statcan.ca), Labour Statistics Division.

New from Statistics Canada

Labour productivity in foreign and domestically controlled manufacturing plants 1973 to 1993

This research paper studies changes in the market share of foreign-controlled and domestically controlled manufacturing plants as well as differences in labour productivity gains across these plants between 1973 and 1993. It also examines the extent to which differences in labour productivity exist between small and large plants, across various industry sectors, and across plants that have been growing or downsizing.

According to this study, the gap in labour productivity between foreign and domestically controlled plants has widened over the period under review. Part of the gap is the result of an increasing concentration of domestic firms in smaller plant size classes, which traditionally have a lower labour productivity.

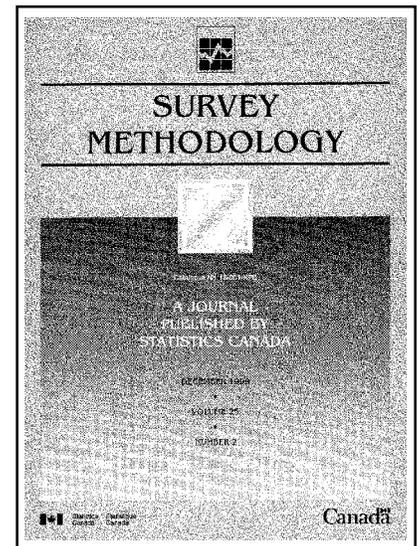
*The research paper **Labour productivity differences between domestic and foreign-controlled establishments in the Canadian manufacturing sector** (11F0019MPE, no. 118) is now available. To order, contact Nicole Richer (613-951-3700) or access Statistics Canada's Web site (www.statcan.ca) under "Products and services" then "Downloadable research papers (free)". For more information, contact John Baldwin (613-951-8588; baldjoh@statcan.ca), Micro-economic Analysis Division.*

Survey methodology December 1999

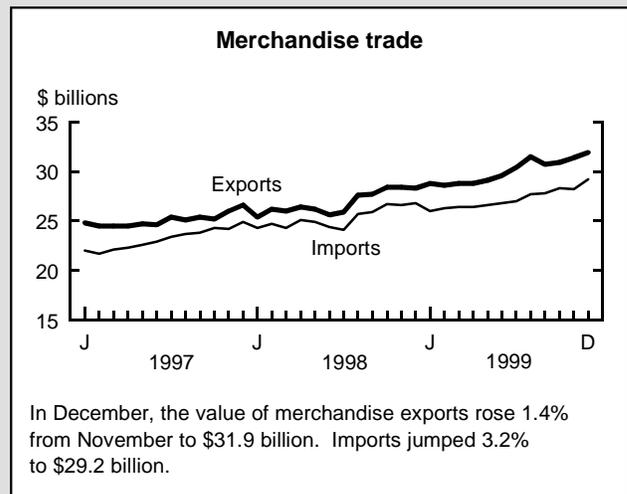
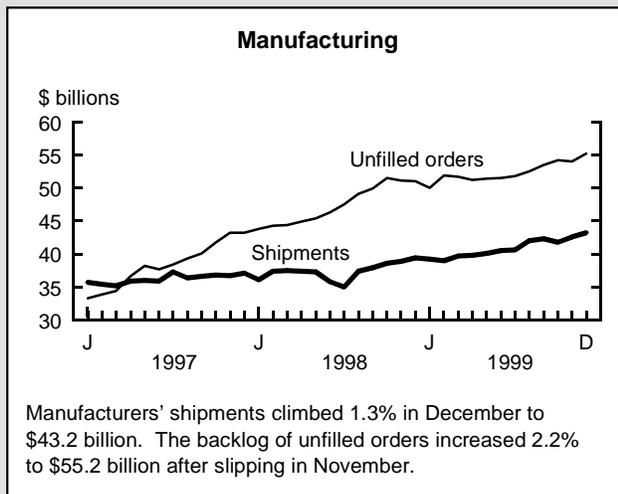
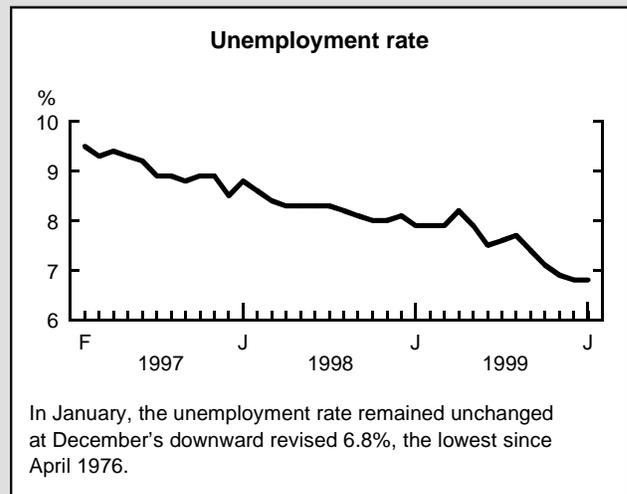
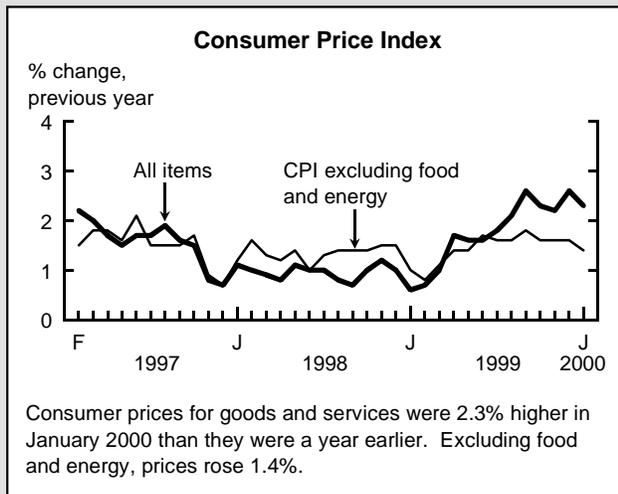
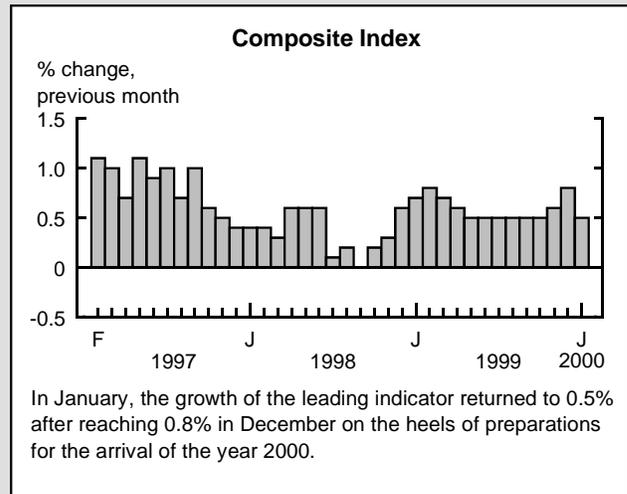
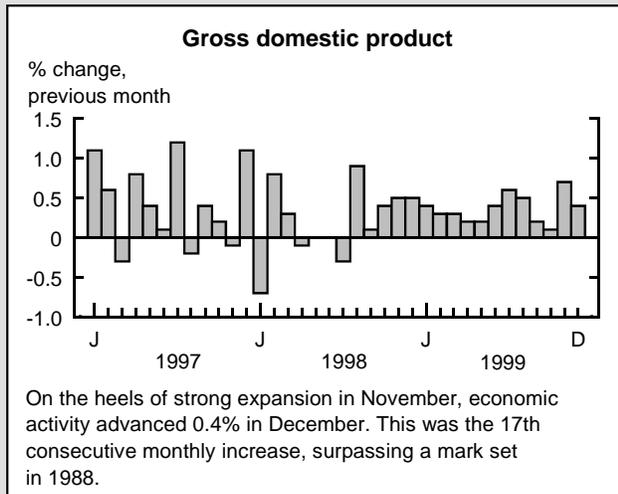
The December 1999 issue of *Survey methodology* is a special edition marking the publication's 25th anniversary. This issue features articles from prominent survey statisticians on a number of evolving developments in methodology. Due to the overwhelming response from contributors, the next issue for June 2000 will continue this theme.

Survey methodology, which is published bi-annually and is a refereed journal, publishes articles about aspects of statistical research relevant to a statistical agency. The publication offers general articles as well as special sections that examine in detail new techniques and experiences for selected topics. Submissions on aspects of statistical research and applications in surveys are welcome.

*The December 1999 issue of **Survey methodology** (12-001-XPB, \$47) is now available. For more information, contact M.P. Singh (613-951-9894; singhmp@statcan.ca), Household Survey Methods Division.*



Current trends



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 (\$ billion, 1992)	December*	766.6	0.4%	4.6%
Composite Index (1992=100)	January	156.7	0.5%	7.2%
Operating profits of enterprises (\$ billion)	Q4 1999*	43.9	7.8%	27.1%
Capacity utilization (%)	Q3 1999	86.0	1.8†	3.6†
DOMESTIC DEMAND				
Retail trade (\$ billion)	December	22.3	2.0%	8.8%
Department store sales (\$ billions)	December	1.43	0.8%	0.1%
New motor vehicle sales (thousand of units)	December	144.0	8.5%	21.9%
Wholesale trade (\$ billion)	December	31.3	0.2%	9.8%
LABOUR				
Employment (millions)	January	14.79	0.3%	2.8%
Unemployment rate (%)	January	6.8	0.0†	-1.1†
Participation rate (%)	January	65.7	0.1†	0.1†
Average weekly earnings (\$)	December*	619.91	0.9%	1.8%
Help-wanted Index (1996=100)	January	168	2.4%	13.5%
INTERNATIONAL TRADE				
Merchandise exports (\$ billion)	December	31.9	1.4%	12.9%
Merchandise imports (\$ billion)	December	29.2	3.2%	8.9%
Merchandise trade balance (all figures in \$ billion)	December	2.7	-0.5	1.3
MANUFACTURING				
Shipments (\$ billion)	December	43.2	1.3%	9.7%
New orders (\$ billion)	December	44.4	4.8%	13.1%
Unfilled orders (\$ billion)	December	55.2	2.2%	8.2%
Inventory/shipments ratio	December	1.29	-0.01	-0.01
PRICES				
Consumer Price Index (1992=100)	January*	111.4	-0.1%	2.3%
Industrial Product Price Index (1992=100)	January*	124.5	0.0%	4.4%
Raw Materials Price Index (1992=100)	January*	134.9	0.5%	30.0%
New Housing Price Index (1992=100)	December	102.0	0.2%	1.7%

Note: All series are seasonally adjusted with the exception of the price indexes.

* new this week

† percentage point

Infomat

A weekly review

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