



Infommat

A Weekly Review

Friday, March 7, 2003

INSIDE

◆ Energy costs send inflation to 12-year high

Soaring energy prices pushed the rate of inflation, as measured by the Consumer Price Index, to nearly a 12-year high in January. Consumers paid 4.5% more for the goods and services in January 2003 than they did in the same month a year earlier.

◆ Current account surplus cut by almost half

Canada's current account surplus in financial dealings with the rest of the world plunged by almost one-half in 2002 in the wake of a substantial decline in merchandise exports.

◆ Robust year for corporate profits

Corporate profits rose to their second highest level ever last year, as both manufacturers and retailers reported sharp gains. Canadian corporations reported a total of \$156.3 billion in profits in 2002, up 5.8% from 2001.

◆ Private and public investment expected to increase

Businesses, governments and institutions intend to allocate more than \$209 billion in 2003 for capital spending on plant, equipment and housing, up 2.1% from 2002. Continued strength in housing and in government investment should offset sluggish business investment.

Economic growth loses momentum

Economic activity slowed in the final quarter of 2002, as real gross domestic product (GDP) advanced 0.4%, less than one-half of the pace set in the third quarter. A drop in exports was only partly offset by sustained strength in personal expenditures.

During the quarter, the economy grew at an annual rate of just 1.6%, compared with 3.6% in the previous quarter.

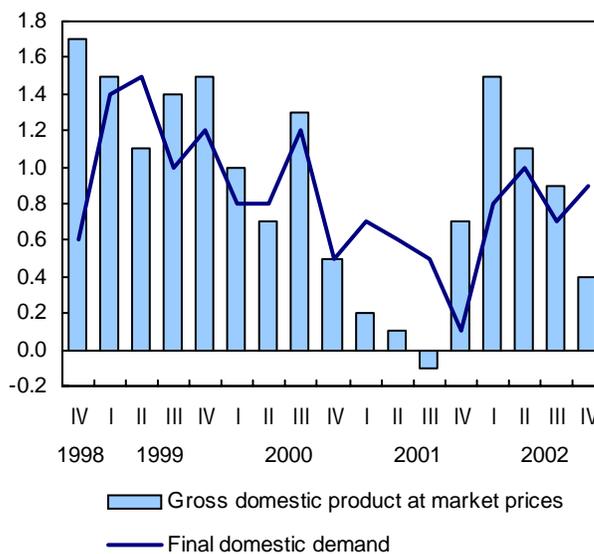
The slower rate of growth resulted from decreased output in manufacturing and agriculture, and lower activity levels in the finance sector. The economy was buoyed by the services sector, in particular wholesale and retail trade, public administration, health care, real estate and business services.

The 2.1% drop in exports in the fourth quarter, which was concentrated in automotive products, came on the heels of three consecutive quarterly gains. Domestic demand picked up somewhat in the fourth quarter. Consumer spending, especially on durable

(continued on page 2)

GDP growth

Quarterly % change, \$ chained 1997



Economic growth loses... (continued from page 1)

goods such as furniture and automobiles, provided the main source of strength. Investment in residential construction, though slower than in the previous quarter, advanced a healthy 2.6%.

Although economic growth decelerated over the four quarters of 2002, the economy grew 3.4% for the year, more than double the rate for 2001.

The decline in exports in the fourth quarter reflected to a large extent sagging US demand for goods. Total automotive exports recorded their largest drop since the fourth quarter of 1996. Wheat exports plummeted by 27%, in line with the drought-reduced stocks. The few sources of strength in exports included forestry products and oil.

Businesses accumulated almost \$10 billion in inventories in the fourth quarter, extending the large accumulations that began in the second quarter. Increases were evident across manufacturing and trade industries, with retail motor vehicle inventories accounting for more than 40% of this build-up.

Consumers increased spending on all major categories of consumer goods and services at a rate of 1.1% in the fourth quarter. Total personal expenditure on durable goods was up 6.4% for the year, driven by the demand for motor vehicles and the boom in the housing market.

Investment in residential structures continued at historically high levels, though activity eased somewhat in the fourth quarter. Nevertheless, quarterly housing starts reached their highest level since 1990. In addition, the existing home market recorded increased activity following two quarters of decline. For the year

as a whole, total investment in residential structures advanced 15.9%, the highest rate of growth since the previous housing boom in 1987.

Business investment in plant and equipment slipped 0.4% in the fourth quarter. Spending on industrial machinery jumped 5.5%, but was offset by falling investment in telecommunications equipment and lower purchases of automobiles by businesses.

Business plant and equipment spending slumped in the year (-3.9%) on the heels of a slowdown (-1.1%) in 2001. Business investment in non-residential structures fell sharply, after a trend to increased spending in the previous nine years

Growth in pre-tax corporate profits eased in the fourth quarter, and was up 6.2% for the year as a whole.

Labour income strengthened in the fourth quarter, as well as for the year as a whole, in line with gains in employment. However, personal disposable income did not keep pace with personal expenditure for most of the quarters, with the result that the saving rate was down both in the fourth quarter and for the year.

In December, the gross domestic product by industry advanced 0.1%, the same as in November.

*More detailed analysis can be found in the fourth quarter 2002 issue of **Canadian economic accounts quarterly review**, (13-010-XIE, free), 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. For more information, contact the information officer (613-951-3640), Income and Expenditure Accounts Division. (See also "Current trends" on page 7.)*

Residential construction investment

The total value of investment in the housing sector soared to a new high of \$52.7 billion in 2002, up a remarkable 20.9% from 2001. All three components of residential construction investment — new housing, renovations and acquisition costs — posted gains from 2001.

By far the largest dollar increase was the result of higher investment in new housing, which totalled \$29.2 billion in 2002, up 30.6%. Spending on renovations, the second-largest component, totalled \$18.6 billion in 2002, up 7.2% from 2001. Acquisition costs rose 26.7% to \$4.9 billion.

Residential construction investment was up substantially in every province and territory in 2002. The largest increases (in dollar terms) were in Ontario (+16.2% to \$22.1 billion) and Quebec (+32.1% to \$11.1 billion).

For more information, or to enquire about the concepts, methods or data quality of this release, contact Étienne Saint-Pierre (613-951-2025; saineti@statcan.ca), Investment and Capital Stock Division.

Energy costs send inflation to 12-year high

Soaring energy prices pushed the rate of inflation to nearly a 12-year high in January. Consumers paid 4.5% more for the goods and services in January 2003 than they did in the same month a year earlier. This was the strongest year-over-year increase in the Consumer Price Index (CPI) since September 1991.

January's increase was the result of two energy-related factors: A return to full cost for Ontario electricity consumers, and the skyrocketing price of gasoline. In December, the CPI all-items index fell to 3.9% after the Ontario government gave consumers a \$75 refund.

Between January 2002 and January 2003, energy prices jumped 15.3%. Gasoline prices, which soared 25.1%, accounted for three-quarters of the overall increase. Accounting for the remainder were a 31.2% increase in fuel oil rose prices, a 1.8% jump in electricity and a 5.3% increase in natural gas. The CPI excluding energy increased 3.5%, the third consecutive identical 12-month increase.

The core inflation rate, which excludes the eight most volatile items and which is closely watched by the Bank of Canada, climbed to 3.3% in January from 2.7% in December.

On a monthly basis, consumers paid 6.2% more in January for gasoline than they had in December. Gasoline prices increased in all provinces and territories except Prince Edward Island, where prices are regulated. Increases ranged from 0.4% in Yellowknife to 10.0% in Saskatchewan.

Natural gas prices increased an average 7.6% from December to January. This rise was largely due to a 17.2% price hike in Alberta, following an increase in service charges. A significant price rise was also recorded in Ontario (+6.9%) as a result of higher supply and delivery costs.

Consumer Price Index, January 2003
% change, previous year, not seasonally adjusted

	All items	Food	Shelter	Transportation	Energy
Canada	4.5	1.9	2.8	11.8	15.3
Newfoundland and Labrador	5.2	0.2	5.5	18.1	16.4
Prince Edward Island	5.7	2.2	4.6	15.1	17.6
Nova Scotia	6.3	2.4	5.9	17.0	24.1
New Brunswick	6.7	3.1	3.4	19.4	17.6
Quebec	4.0	1.4	3.7	11.8	14.9
Ontario	4.3	3.0	2.0	11.5	14.1
Manitoba	3.6	1.4	1.4	8.1	13.0
Saskatchewan	3.9	0.3	2.0	7.9	8.6
Alberta	7.1	1.2	6.3	17.6	25.7
British Columbia	3.1	1.4	1.4	7.7	13.0
Whitehorse	3.9	-0.2	2.0	10.8	12.4
Yellowknife	4.0	0.5	3.0	6.1	17.6

The price of non-alcoholic beverages increased 9.4% from December to January, the result of a return to regular prices after holiday promotions.

The automotive vehicle purchase price index fell 1.2% in January. More generous rebates more than offset the few increases in suggested retail prices of some manufacturers.

In January, the travel tour index fell 8.6%. Prices decreased in all provinces; the strongest drops were posted in Ontario (-12.6%) and Saskatchewan (-11.4%).

The January 2003 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; infounit@statcan.ca) or Joanne Moreau (613-951-7130), Prices Division. (See also "Current trends" on page 7.)

Networked businesses and information sharing

Almost three-quarters (72%) of business enterprises in Canada had electronic networks in operation in 2001, according to a new study using data from the Survey of Electronic Commerce and Technology.

According to the working paper *Who's sharing what with whom?*, almost one-third of networked businesses made product description catalogues available to external organizations including customers, suppliers and other organizations in 2001. About 19% shared customer information externally, and only 15% did so internally.

Overall, the public sector by far outstripped the networked private sector in the use of electronic networks to share information both internally and externally. The public sector showed a marked orientation towards using electronic networks to facilitate job mobility and training that was not echoed by the networked private sector.

The working paper Who's sharing what with whom? How Canadian businesses used electronic networks to share information in 2001 (88F0006XIE, free) is now available on Statistics Canada's website (www.statcan.ca). For more information, contact Louise Earl (613-951-2880), or Craig Kuntz (613-951-7092), Science, Innovation and Electronic Information Division.

Current account surplus cut by almost half

Canada's current account surplus in financial dealings with the rest of the world plunged by almost one-half last year in the wake of a substantial decline in merchandise exports.

The surplus for the year as a whole was just over \$17.3 billion, far below the record high of more than \$30 billion in 2001, on a seasonally adjusted basis.

The current account, which summarizes all foreign transactions associated with current economic activity in Canada, includes four main types of transactions: trade in goods, trade in services, flows of investment income and transfers.

The surplus in goods for 2002 declined from a record \$64.0 billion in 2001 to \$54.2 billion. The largest decline in exports occurred in the machinery and equipment sector, where exports of television, telecommunications and related equipment fell to one-half their record value in 2000.

At the same time, Canadian companies imported more automotive products as well as more consumer goods.

The deficit on commercial services declined from \$8.4 billion to \$7.9 billion, the result mainly of larger exports of architectural, engineering and other technical services, and financial services.

Canada's travel deficit — the difference between what Canadians spend abroad and what foreigners spend in Canada — increased to almost \$1.7 billion, but it was still the second lowest since 1987. The travel deficit with the United States fell significantly for the second year in a row.

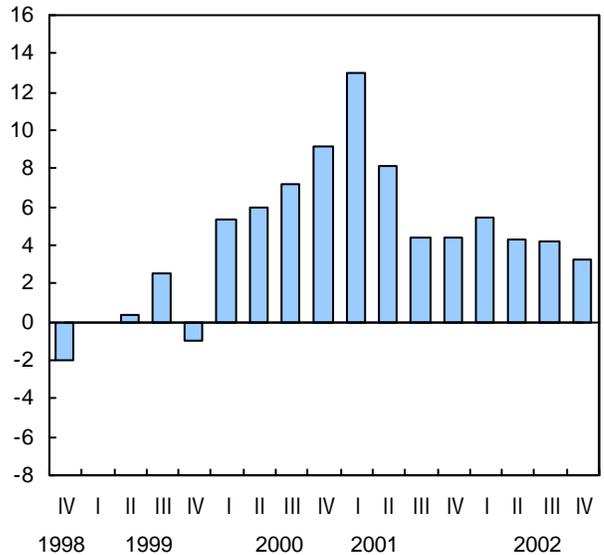
After decreasing for two years, the deficit in investment income widened last year from \$27.5 billion to \$30.4 billion. Profits accruing to holders of foreign direct investment in Canada rose, while the profits on Canadian direct investment abroad declined.

On a quarterly basis, the seasonally adjusted current account surplus fell by \$900 million to \$3.3 billion in the fourth quarter of 2002. It was the first time since the fourth quarter of 1999 that the current account surplus slipped below the \$4-billion mark.

The deficit in investment income widened as larger dividends were paid to foreign direct investors, while the surplus on goods declined because of lower goods exports. The deficit in services improved slightly.

Current account balance

\$ billions, seasonally adjusted



In the financial account, which is not seasonally adjusted, Canadian direct investors channelled \$16.0 billion into foreign economies during the last three months of 2002, their strongest investment in a year and a half. That took direct investment for the year as a whole to \$43.9 billion, lower than in both 2000 and 2001.

Foreign direct investors channelled \$5.7 billion into the Canadian economy during the fourth quarter. The total for the year as a whole stood at \$33.6 billion.

Foreign portfolio investors bounced back with their highest investment in a year during the fourth quarter, pumping \$9.4 billion into Canadian securities, after reducing their holdings in the third quarter. The investment went mostly to debt securities, although they did buy a modest amount of Canadian equities.

Total foreign investment in Canadian securities fell to \$17.9 billion for the year, half what it was in 2001.

*The fourth quarter 2002 issue of **Canada's balance of international payments** (Internet: 67-001-XIB, \$29/\$93; paper, 67-001-XPB, \$38/\$124) will be available soon. For more information, contact Arthur Ridgeway (613-951-8907), Balance of Payments Division.*

Robust year for corporate profits

Corporate profits rose to their second highest level ever last year, as both manufacturers and retailers reported sharp gains. Canadian corporations reported a total of \$156.3 billion in profits in 2002, up 5.8% from 2001.

Last year's level was second only to the peak of \$173.0 billion recorded in 2000, when high profits in energy and the booming electronics and telecommunications industry led the way. The increase in profits in 2002 followed a 14.6% decline in 2001.

Non-financial profits surged 9.6% in 2002 to \$123.9 billion. However, the financial group of industries suffered a 6.5% profit slide in 2002, led by a decline in the depository credit intermediaries, mainly chartered banks.

Manufacturers enjoyed an upbeat 2002, as a 3.9% increase in operating revenue contributed to a 13.5% jump in operating profits to \$41.7 billion.

Manufacturers of motor vehicles and parts saw profits improve 36.5%, with hefty incentive programs and low interest rates sustaining sales growth throughout most of the year. Strong US demand drove up exports of automotive products.

Manufacturers of primary metals cited stronger shipments and firming prices as factors in the more than tripling of annual profits to \$2.0 billion. Profits of chemical producers advanced 18.9% to \$6.6 billion in 2002. Other notable profit gains were reported by manufacturers of non-metallic minerals, machinery and equipment, and clothing. Computer and electronics manufacturers remained mired in a prolonged slump, but nonetheless reduced operating losses to \$500 million from losses of \$1.2 billion in 2001.

On a negative note, wood and paper producers' operating profits fell to \$3.4 billion, 30.9% below 2001 levels. Profits were squeezed by the imposition of export tariffs by the United States in May. Demand for lumber was strong, sustained by the vibrant North American housing market. However, lumber prices softened because of oversupply, as some Canadian producers cranked up production following the imposition of the export tariffs.

Petroleum and coal producers earned \$5.0 billion in operating profits in 2002, down 10.4% from the \$5.6 billion earned in 2001. Despite climbing steadily throughout the year, petroleum prices did not reach the highs attained early in 2001.

Financial statistics for enterprises

Seasonally adjusted

	Q3	Q4	Q3 to Q4	2002	2001 to
	2002	2002	2002		2002
	\$		%	\$	%
	billions		change	billions	change
All industries					
Operating revenue	572.4	583.4	1.9	2,264.0	3.6
Operating profit	39.9	41.9	5.1	156.3	5.8
Non-financial industrie					
Operating revenue	522.2	532.9	2.1	2,063.5	4.4
Operating profit	32.0	33.9	6.1	123.9	9.6
Financial industries					
Operating revenue	50.2	50.5	0.5	200.5	-3.7
Operating profit	7.9	8.0	1.0	32.4	-6.5

Retailers reported \$9.5 billion in operating profits in 2002, up from \$6.6 billion in 2001. Operating revenue jumped 9.2% to \$312.8 billion.

The transportation and warehousing industry saw profits increase to \$7.3 billion in 2002 after falling to a six-year low of \$4.7 billion in 2001. Operating revenue edged up 1.8% to \$81.1 billion, recovering somewhat from the impact of the events of September 11, 2001.

On a quarterly basis, corporate profits rose 5.1% to \$41.9 billion in the fourth quarter, following a 1.0% gain in the third. This was the fourth straight quarterly increase, but well below the 10.6% and 13.2% increases registered in the first two quarters of the year.

The non-financial industries boosted profits 6.1% in the fourth quarter, and the financial industries turned in a more modest 1.0% quarterly rise.

*The fourth quarter 2002 issue of **Quarterly financial statistics for enterprises** (61-008-XIE, \$26/\$86) is now available. For general information, contact Jeannine D'Angelo (613-951-2604). For analytical information, contact Bill Potter (613-951-2662) or Haig McCarrell (613-951-5948), Industrial Organization and Finance Division.*

Private and public investment expected to increase

Businesses, governments and institutions intend to allocate more than \$209 billion in 2003 for capital spending on plant, equipment and housing, up 2.1% from 2002.

Continued strength in housing and in government investment should offset sluggish business investment.

A sample survey of 27,000 organizations shows total capital spending in Canada will reach \$209.7 billion, compared with the preliminary total for 2002 of just over \$205.3 billion.

Between them, Canada's two most populous provinces, Quebec and Ontario, will account for more than one-half of spending in 2003. Intentions in Ontario represent 37% of the total, and intentions in Quebec, 20%.

Overall spending on plant and equipment is expected to hit \$154.3 billion, up 1.1% from 2002; housing investment is expected to increase 5.0% to \$55.4 billion.

Investment intentions in housing, which recorded an outstanding year in 2002, account for more than 60% of the anticipated growth in investment in 2003. Gains are expected in both major components: new housing and renovations.

Spending in public administration is expected to increase 6.8%, almost entirely from local governments, where a \$1.1 billion rise is anticipated. The majority of this increase is from Quebec and Ontario.

The outlook for business investment this year is still sluggish. Businesses, excluding housing, governments and institutions, expect to increase spending by a marginal 0.1%.

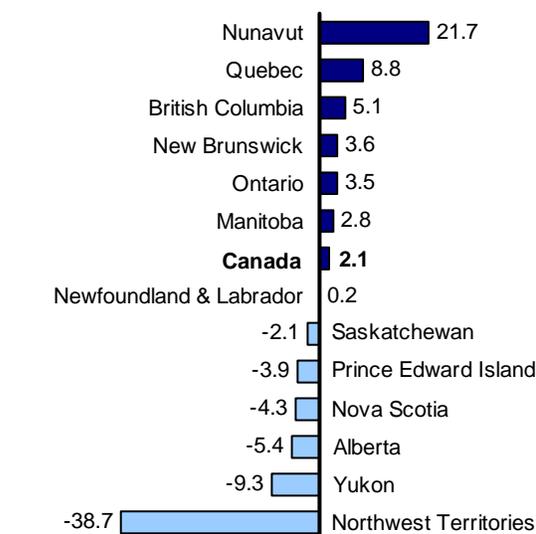
Companies in mining and oil and gas extraction together with firms in information and communication technology expect to lower their spending plans by \$3.1 billion in 2003.

Capital spending in the non-conventional oil and gas extraction industry in 2003 is expected to fall 28.4% to \$4.6 billion, wiping out increases in 2002 and settling at a level below that for 2001.

Conventional oil and gas extraction expects to fare somewhat better in 2003, with a 2.6% increase on the heels of 19.4% decline in 2002.

Overall, investment intentions in the information and communication technology sector are expected to decrease 7.4% in 2003. This comes from a 17.6% decline in the manufacturing component, a 7.7% drop in goods-related services and a 6.4%

Investment growth (%)



decline in the intangible services.

Manufacturing industries anticipate an increase of 6.6% in 2003, with paper and primary metal projects the largest contributors. This will be the manufacturing sector's first increase in spending since 2000. Though an improvement, investment in manufacturing of just under \$18.0 billion would be similar to levels last seen in 1995.

The finance and insurance sector expects a gain of 7.9% to nearly \$12.0 billion. The increase is concentrated in the credit intermediation and related activities sector, where banks and leasing companies expect to recapture almost half of the decline experienced in 2002.

Investment intentions are expected to increase in seven provinces and territories. The largest increases are expected in Nunavut and Quebec. Investment in Quebec is anticipated to reach \$42.2 billion. In Ontario, it is expected to hit almost \$78.2 billion, up 3.5%.

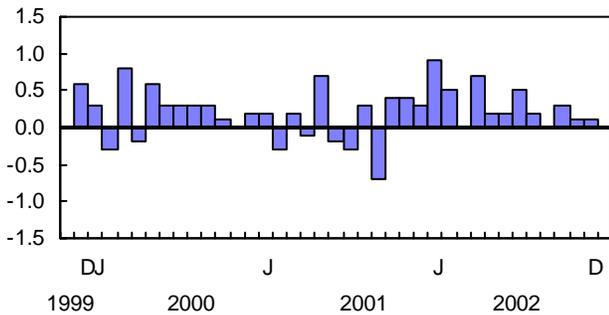
The largest anticipated dollar decline will likely be in Alberta, where investment is expected to fall \$2.2 billion to about \$39.3 billion. The province has been hit hard by the continued slump in oil and gas investment.

Private and public investment in Canada, intentions 2003 (Internet: 61-205-XIB, \$35) is now available. For more information, contact Gilbert Paquette (1-800-571-0494; 613-951-9818; gilbert@statcan.ca), Investment and Capital Stock Division.

Current trends

Gross domestic product

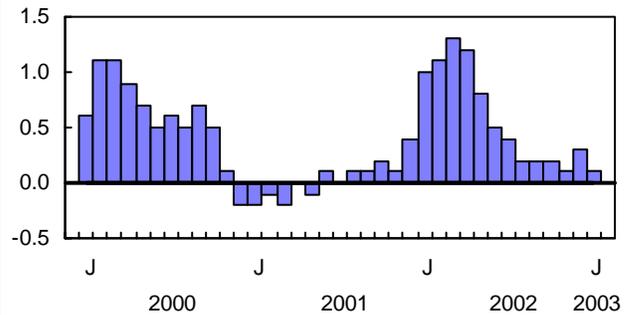
% change, previous month



Total economic activity edged up 0.1% in December, the same as in November.

Composite Index

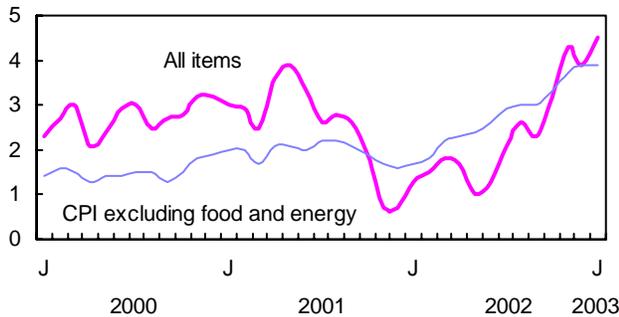
% change, previous month



The leading indicator grew 0.1% in January after rising 0.3% in December.

Consumer Price Index

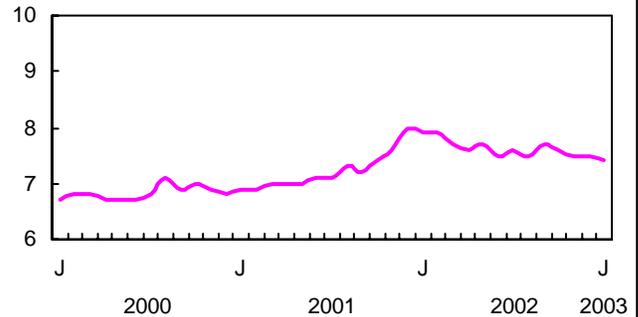
% change, previous year



Consumer prices for goods and services were 4.5% higher in January than they were a year earlier. Excluding food and energy, prices rose 3.9%.

Unemployment rate

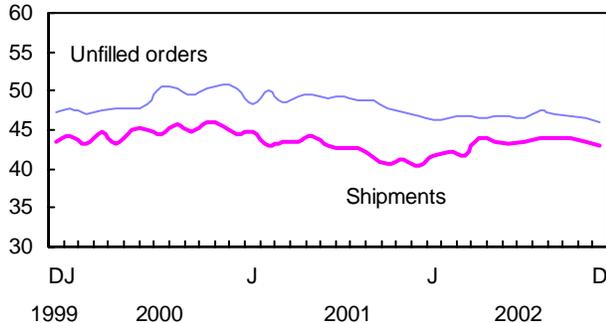
%



In January, the unemployment rate edged down 0.1 percentage points to 7.4%.

Manufacturing

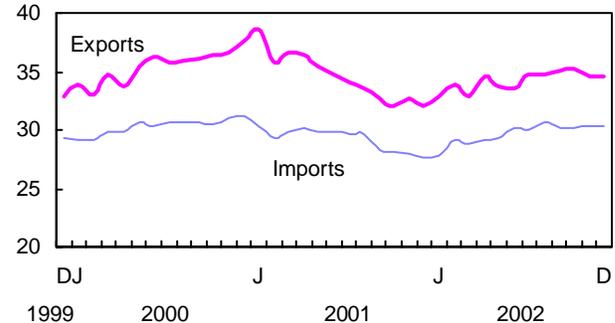
\$ billions



Manufacturers' shipments declined 0.9% in December to \$43.0 billion. The backlog of unfilled orders declined 1.1% to \$46.0 billion.

Merchandise trade

\$ billions



In December, the value of merchandise exports fell 0.3% to \$34.5 billion. Imports rose 0.5% to \$30.4 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	December*	989.2	0.1%	3.8%
Composite Index (1992=100)	January	180.1	0.1%	6.6%
Operating profits of enterprises (\$ billions)	Q4 2002	41.9	5.1%	32.8%
Capacity utilization rate (%) ²	Q3 2002	83.3	0.8†	2.5†
DOMESTIC DEMAND				
Retail trade (\$ billions)	December	25.9	0.2%	3.7%
New motor vehicle sales (thousands of units)	December	150.3	6.3%	2.7%
Wholesale trade (\$ billions)	December	36.1	0.3%	9.1%
LABOUR				
Employment (millions)	January	15.6	0.0%	3.1%
Unemployment rate (%)	January	7.4	-0.1†	-0.5†
Participation rate (%)	January	67.3	-0.2†	0.8†
Average weekly earnings (\$)	December	685.42	0.21%	2.17%
Help-wanted Index (1996=100)	February*	111.4	-0.2%	-11.5%
Regular Employment Insurance beneficiaries (in thousands)	December	547.8	-0.5%	-2.1%
INTERNATIONAL TRADE				
Merchandise exports (\$ billions)	December	34.5	-0.3%	7.8%
Merchandise imports (\$ billions)	December	30.4	0.5%	10.5%
Merchandise trade balance (all figures in \$ billions)	December	4.1	-0.3	-0.4
MANUFACTURING				
Shipments (\$ billions)	December	43.0	-0.9%	6.6%
New orders (\$ billions)	December	42.5	-1.6%	7.0%
Unfilled orders (\$ billions)	December	46.0	-1.1%	-1.7%
Inventory/shipments ratio	December	1.47	0.02	-0.08
PRICES				
Consumer Price Index (1992=100)	January	121.4	0.8%	4.5%
Industrial Product Price Index (1997=100)	January	108.4	0.3%	2.0%
Raw Materials Price Index (1997=100)	January	125.6	5.2%	22.2%
New Housing Price Index (1992=100)	December	112.8	0.3%	5.1%

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.

Infomat

A weekly review

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Products released from February 27 to March 5, 2003

SUBJECT AREA Title of product	Period	Catalogue number	Price (\$) (issue/subscription)
AGRICULTURE			
Cattle statistics	2000-2003	23-012-XIE	free
The dairy review	Q4 2002	23-001-XIB	27/89
Fruit and vegetable production	February 2003	22-003-XIB	23/46
Hog statistics	Q4 2002	23-010-XIE	free
Livestock statistics	Q4 2002	23-603-XIE	34/112
Sheep statistics	2000-2003	23-011-XIE	free
Stocks of frozen and chilled meat products	February 2003	23-009-XIE	free
HEALTH STATISTICS			
. . . au courant	February 2003	82-005-XIE	free
Canadian Community Health Survey optional content and related tables	2000-2001	82-577-XIE	free
Canadian Community Health Survey profiles		82-576-XIE	free
INCOME AND EXPENDITURE ACCOUNTS			
Canadian economic accounts quarterly review	Q4 2002	13-010-XIE	free
Estimates of labour income, monthly estimates	December 2002	13F0016XPB	20/65
Gross domestic product by industry	December 2002	15-001-XIE	11/110
Financial flow accounts, quarterly estimates	Q4 2002	13-014-PPB	50/180
National income and expenditure accounts, quarterly estimates	Q4 2002	13-001-PPB	50/180
INDUSTRIAL ORGANIZATION AND FINANCE			
Quarterly financial statistics for enterprises	Q4 2002	61-008-XIE	26/86
INTERNATIONAL TRADE			
Canadian international merchandise trade	December 2002	65-001-XIB	14/141
Imports by country	2002	65-006-XMB	62/206
Imports by country	2002	65-006-XPB	124/412
INVESTMENT AND CAPITAL STOCK			
Private and public investment in Canada, intentions	2003	61-205-XIB	35
MANUFACTURING, CONSTRUCTION AND ENERGY			
Asphalt roofing	January 2003	45-001-XIB	5/47
PRICES			
Canadian International Development Agency Post Indexes	March 2003	62F0084XIE	free
Foreign Service Directives Post Indexes	March 2003	62F0082XIE	free
Military Post Indexes	March 2003	62F0085XIE	free
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