



Infommat

A Weekly Review

Friday, March 8, 2002

INSIDE

◆ Current account surplus hits record high

Canada's current account surplus with the rest of the world reached a record high of \$29.1 billion last year, up \$2.2 billion from 2000. Last year's surplus was the third in a row, and only the fifth in the last 20 years. In the financial account, Canadian direct investors injected \$57.3 billion into foreign economies in 2001.

◆ Investment expected to fall for first time in a decade

Investment in plants and equipment in 2002 by businesses, governments and institutions is expected to decline for the first time since 1993. Investment intentions are estimated at \$150.4 billion, down 1.6% from last year. The main factor is a decline in proposed investment in oil and gas extraction and air transportation.

◆ Corporate operating profits plunge to a three-year low

Corporate operating profits plunged to their lowest level in three years in 2001, more than wiping out gains in the previous year. Profits declined 20.7% last year, following a 17.5% gain posted in 2000. Manufacturing profits shrank by one-third.

◆ Petroleum, coal product prices push down manufacturers' prices

Manufacturers' prices fell 1.2% in January compared with a year earlier. If petroleum and coal product prices (which dropped 26.1%) had been excluded, manufacturers' prices would have increased 0.6%. At the same time, raw materials cost manufacturers 13.0% less in January.

Consumer spending drives growth in economy

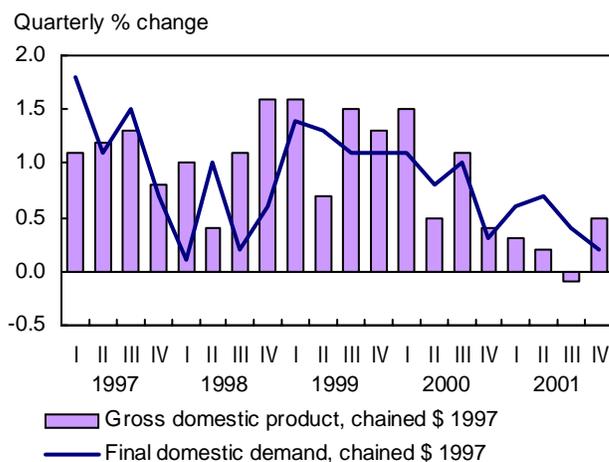
Consumer spending rebounded in the final three months of 2001, resulting in a 0.5% advance in gross domestic product, the strongest quarterly growth in five quarters.

However, over the entire year, economic growth slowed substantially, advancing only 1.5%, less than half its pace in each of the previous four years. Consumers tightened their purse strings and businesses put the brakes on investment outlays, resulting in the weakest annual growth since 1992.

During the fourth quarter, zero-percent financing and other incentives brought consumers to car dealerships in droves. Motor vehicles sales accounted for about one-half the 1.0% increase in consumer spending.

Mild fall weather and low mortgage rates between October and December contributed to a 5.9% hike in business investment in new residential construction, mirrored by a 5.5% increase in issues of residential building permits. Spending on household furnishings and appliances picked up, as did the housing market.

Gross domestic product and domestic demand



(continued on page 2)



... Consumer spending drives growth in economy

Business investment in machinery and equipment plunged 9.0%. Investment in industrial machinery was down 6.4%, its fourth consecutive quarterly decline, and the steepest in 2001. Investment in telecommunications equipment fell 13.4%.

Businesses reduced non-farm inventories by \$11.7 billion, more than six times the reduction in the third quarter. Manufacturers unloaded \$3.2 billion worth of their inventories of durable goods. Reflecting in part the clearance of motor vehicles, wholesalers sold off \$3.6 billion of their stocks of durable goods, while retailers unloaded \$5.3 billion of theirs.

Corporate profits before taxes fell another 5.6% in the fourth quarter, following a 12.9% decline in the third.

For 2001 as a whole, the economy cooled markedly. Final domestic demand increased only 2.2%, its weakest gain since 1996.

The sharp drop in interest rates in 2001 stimulated sales and new housing construction. Business investment in new housing construction rose 5.1%, more than double the rate in 2000. The robust housing market helped sustain spending on home furnishings and household appliances. Still, these items, like almost all other categories of consumer spending, recorded weaker gains than in 2000.

With the slowdown in the American economy, the volume of Canada's exports of goods and services declined 3.7% in 2001, the first drop since 1982. Labour income posted a modest 4.2% gain, its weakest showing since 1996.

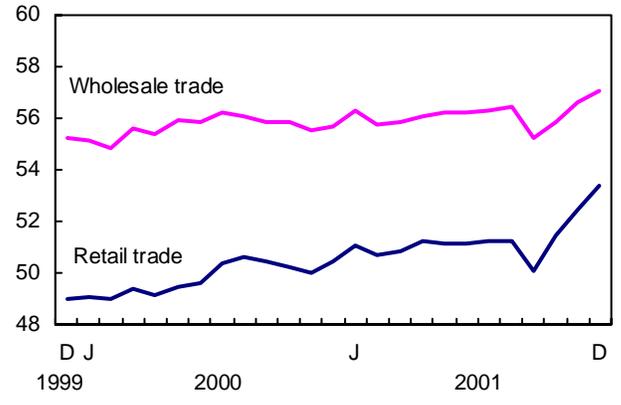
After two years of solid growth, corporate profits for 2001 dropped 6.0%. Manufacturing profits shrank more than one-third in 2001, with notable declines among computer and electronics manufacturers, motor vehicle and parts manufacturers, and wood and paper producers. Airline profits also slumped significantly.

On a monthly basis, GDP by industry rose 0.2% in December, the third consecutive monthly advance since the plunge in September. With this increase, the economy regained all the ground it lost in September.

Stimulated by incentive programs, motor vehicle sales boosted the retail industry and provided the single largest push to the economy. Retail sales increased 1.7%. The economy also got a

Retail and wholesale trade

GDP \$ billions (1997 dollars)



lift from wholesale trade, and from growing demand for information and communication technology (ICT) services.

Travel-related industries continued to recover from the impact of September 11. Output in the air transportation industry rose 5.1% in December, the third consecutive monthly increase. However, output levels in this industry remained 3.8% below those of August.

Manufacturing output fell 0.8% in December, the sixth decrease in seven months; 13 of 21 sectors registered declines.

For the year as a whole, output in manufacturing declined 4.0% compared with a 5.2% gain in 2000. Manufacturers of ICT products led the decline, as investment in telecommunications and related equipment fell sharply.

The fourth quarter 2001 issue of National income and expenditure accounts, quarterly estimates (Internet: 13-001-XIB, \$33/\$109; paper: 13-001-XPB, \$44/\$145) is now available. For more information, contact the client services officer (613-951-3810). The December 2001 issue of Gross domestic product by industry (Internet: 15-001-XIE, \$11/\$110) is now available. For more information, contact Yolande Chantigny (1 800 887-4623). (See also "Current trends" on page 7.)

Current account surplus hits record high

Canada's current account surplus with the rest of the world reached a record high of \$29.1 billion last year, an increase of \$2.2 billion from 2000.

Last year's surplus was the third in a row, and only the fifth in the last 20 years. There were also surpluses in 1996 and 1982.

The current account, which summarizes all foreign transactions associated with current economic activity in Canada, includes four types of transactions: trade in goods, trade in services, flows of investment income and transfers. A surplus is seen as positive for the Canadian currency.

The main contributor last year was the surplus in goods, which also reached an all-time high of \$61.5 billion, up \$2.2 billion from the previous year. Exports and imports each declined for the first time since 1991. Imports fell more than exports, producing

(continued on page 3)

... Current account surplus hits record high

the relatively small rise in the merchandise surplus compared with record gains during the previous two years. Import reductions were concentrated mainly in machinery and equipment, notably telecommunications and office machinery.

Imports of auto parts and trucks also fell. Weakness in international demand brought parallel declines in exports of these goods, and a smaller drop in forest products, led by wood pulp. Price changes in energy markets led to a substantial increase in the dollar value of natural gas exports, and almost as large a fall in exports of crude petroleum in 2001.

The United States accounted for most of the annual growth in the surplus in goods, as Canada's imports from the United States declined noticeably more than our exports south of the border. Deficits narrowed slightly elsewhere, but continued an upward trend with the European Union.

On a quarterly basis, the current account surplus fell to \$3.2 billion, down about \$700 million from the third quarter. This decline was largely the result of a decrease in the surplus for goods in the fourth quarter, following a drop in export prices.

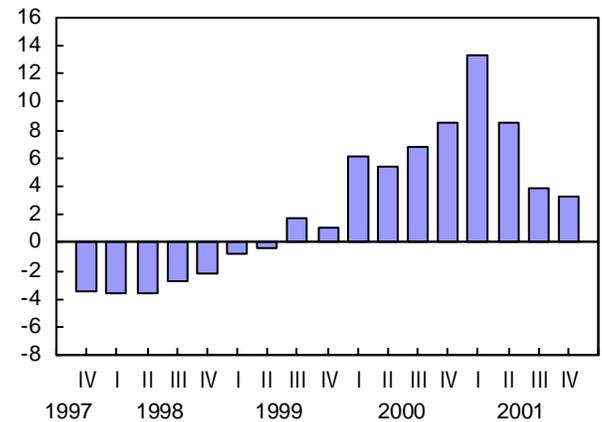
Natural gas exports alone fell \$1.5 billion in the fourth quarter due to lower export prices. Higher deficits on investment income and commercial services were nearly offset by lower deficits for travel and transportation, as Canadians sharply reduced their international travel in the fourth quarter. The number of Canadians travelling to both US and overseas destinations declined, as did their spending.

In the financial account, which is not seasonally adjusted, Canadian direct investors injected \$57.3 billion into foreign economies in 2001, their second highest investment on record. Two-thirds of the annual investment went to the United States, and the balance was widespread.

Last year's investment was also widespread across industries, led by finance and insurance. Acquisitions of foreign companies represented about 40% of the total.

Current account balance

\$ billions, seasonally adjusted



Foreign direct investment in Canada also increased. During the fourth quarter, investment of \$12.9 billion flowed into the Canadian economy, bringing the annual total to \$42.8 billion. While this was the second highest annual total on record, it was less than one-half the amount invested in 2000.

Acquisitions of Canadian companies again played a strong role in fourth quarter investment, as they did throughout last year. The main focus was the energy industry, where most investment originated exclusively in the United States.

*The fourth quarter 2001 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.*

Investment expected to fall for first time in a decade

Substantial declines in proposed investment in oil and gas extraction and air transportation will likely produce lower capital spending in 2002, according to first intentions of public and private investment.

Canadian businesses, governments and institutions are expected to invest \$150.4 billion in plants and equipment in 2002, down 1.6% from 2001. This decrease in plant and equipment spending is the first since 1993, and arrives on the heels of five consecutive quarters of declining capacity utilization.

This over-capacity, as well as weaker profits, has exerted a dampening effect on investment. Non-residential construction investment is expected to fall 5.0% to \$65.4 billion, but machinery and equipment investment is expected to rise 1.2% to \$85.0 billion in 2002.

Note to readers

Investment intentions are based on a sample survey of 27,000 businesses, governments and institutions. The survey, which was conducted from October 2001 to January 2002, had a 76% response rate that covers 89% of the designed sample weight. The coefficient of variation, which measures the precision of the estimated data, is 0.5% at the Canada level. Data in this article are calendarized and expressed in current dollars.

All figures reflect the recent changes to the machinery and equipment series for the inclusion of all software expenditures as capital. This change to the concept used for capital is required by the system of national accounts.

(continued on page 4)

... Investment expected to fall for first time in a decade

With proposed investment in housing included, total investment in 2002 would reach \$194.0 billion, down 1.0% from 2001. Housing investment alone is expected to rise 1.3% to \$43.6 billion as a result of increases in both major components (new housing and renovations).

Capital spending in the conventional oil and gas extraction industry in 2002 is expected to fall 18.7% to \$15.6 billion. In January 2002, the number of gas well completions was down 16% from January 2001, and the number of metres drilled was down 33%.

Spending in the air transportation industry is also expected to return to pre-2000 levels. A 33.0% drop will leave anticipated investment at less than \$1.8 billion. A sharp fall in projected aircraft leasing instigated the decline.

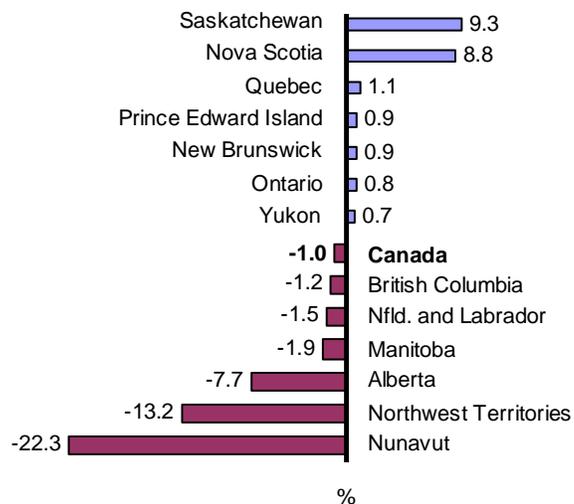
Investment intentions in the information and communication technology sector are expected to fall 3.0% in 2002. This decline originates largely from the intangible services component (-3.4%) and the manufacturing component (-9.6%). However, corporations in the goods-related services component, dominated by equipment rental and leasing, expect an increase of 5.7%.

Spending in the electric power generation, transmission and distribution industry should thrive in 2002. An expected increase of 21.2% will push up investment to \$8.5 billion. The increase comes from Ontario and Quebec.

Government spending on capital is expected to increase 8.2% to \$18.6 billion. This increase is largely the result of a proposed \$718.4-million increase in construction spending by municipalities, and a planned \$673.5-million increase in machinery and equipment spending by federal government departments.

Investment intentions are expected to decrease in six of 13 provinces and territories. The largest declines are expected in

Expected investment growth in 2002



Nunavut (-22.3%) and the Northwest Territories (-13.2%). The largest dollar decline will be in Alberta, down \$3.2 billion, hit hard by the oil and gas drop-off.

Private and public investment in Canada, intentions 2002 (Internet: 61-205-XIB, \$35) will be available soon. For more information, contact Gilbert Paquette (1-800-571-0494; 613-951-9818; gilbert@statcan.ca) or Les Shinder (1-877-338-2368; 613-951-2030; shinder@statcan.ca), Investment and Capital Stock Division.

Corporate operating profits plunge to a three-year low

Operating profits fell to \$156.8 billion in 2001 from \$197.7 billion in 2000. This 20.7% decline more than offset the 17.5% profit gain posted in 2000, and dropped annual operating profits to their lowest since 1998.

Within the financial group of industries, the funds industry saw their operating profits tumble to \$7.8 billion in 2001 from \$28.8 billion in 2000, largely due to losses realized on the sale of investment securities. Both Canadian and foreign equity funds were hit hard by the slump in the equity markets in 2001.

Manufacturing profits shrank by one-third in 2001, falling to \$35.3 billion from \$53.3 billion in 2000. Computer and electronics manufacturers led the profit surge in 2000, but in 2001 they suffered the largest profit decline. Operating profits tumbled from \$4.2 billion in 2000 to a loss of \$1.6 billion in 2001. The prolonged world-wide slump in demand for electronic and telecom-

munications products took its toll on corporate profits over the year.

Motor vehicle and parts manufacturers saw their profits almost halved in 2001. Exports of automotive products, mainly to the United States, fell 5.3%. Despite extensive buyer incentive plans that boosted auto sales late in the year, manufacturers could not shake the effects of the North American economic downturn on annual revenue and profits.

Wood and paper manufacturing profits slumped to a three-year low of \$4.5 billion in 2001 compared with \$7.2 billion in 2000. The expiry of the Canada-US Softwood Lumber Agreement in March, and the ensuing countervailing and anti-dumping duties levied against Canadian softwood exports, created havoc in the lumber export market. Exports of all forestry products fell 7.5% in 2001. Domestic lumber demand remained surprisingly resilient, bolstered by strong construction activity. However, newsprint prices faltered due to softening domestic and foreign demand.

(continued on page 5)

... Corporate operating profits plunge to a three-year low

Chemical producers suffered the effects of lower demand in 2001 for chemicals and materials used in the manufacture of automobiles, aircraft, high-technology and other manufactured products. Consequently, operating profits fell 23.4% from 2000 to \$5.6 billion.

Transportation and warehousing industry profits slid to \$2.7 billion from a record high \$5.1 billion in 2000. Airline revenue and profits were already declining prior to September 11, and accelerated downward by year-end. The economic downturn trimmed manufacturing shipments by 5.2% in 2001, curtailing freight and cargo activity for most transportation carriers.

However, operating profits for companies involved in oil and gas extraction climbed 12.1% to a record \$21.9 billion in 2001, despite faltering over the latter half of the year. Strong crude oil and natural gas prices, as well as healthy export demand early in the year more than offset the second half downturn. Average natural gas prices in 2001 were more than 50% above 2000 levels.

Fourth quarter operating profits fell 5.6% from the third quarter to \$33.8 billion, the lowest since 1996. While fourth quarter profits continued downward, the pace of decline slowed considerably from the revised 18.2% plunge in the third quarter.

Oil and gas extraction companies had little to cheer about in the fourth quarter, as profits dropped 15.1% and revenues slid 5.1% from the third quarter. Crude oil prices had declined in each month of the fourth quarter, hampered by faltering demand and rising inventories.

While the manufacturing sector posted improved fourth quarter profits (+11.0%), the gains were concentrated in the computer and electronics industry. Only five of the 17 manufacturing industries reported any real profit growth in the fourth quarter.

The Quarterly financial statistics for enterprises (Internet : 61-008-XIE, \$26/\$86) will be available soon. For general information, contact Jeannine D'Angelo (613-951-2604), Client Services Unit. For analytical information, contact Bill Potter (613-951-2662), Promise Sanipé (613-951-0274) or Jean-Pierre Simard (613-951-0741), Industrial Organization and Finance Division.

Financial statistics for enterprises

Seasonally adjusted

	Q4 2000	Q3 2001	Q4 2001	Q3 to Q4 2001	2001	2000 to 2001
	\$ billions			% change	\$ billions	% change
All industries						
Operating revenue	532.7	509.7	502.1	-1.5	2,070.6	-0.7
Operating profit	48.2	35.8	33.8	-5.6	156.8	-20.7
Non-financial industries						
Operating revenue	473.3	457.1	450.7	-1.4	1,852.5	0.2
Operating profit	34.8	28.3	27.2	-3.8	121.2	-13.0
Financial industries						
Operating revenue	59.4	52.6	51.4	-2.2	218.1	-8.1
Operating profit	13.4	7.5	6.6	-12.4	35.6	-39.1

Petroleum, coal product prices push down manufacturers' prices

Manufacturers' prices, as measured by the Industrial Product Price Index (IPPI), fell 1.2% in January compared with January 2001, their fourth consecutive month of decline. This was a slower pace than December's year-over-year drop of 2.4%.

On an annual basis, petroleum and coal product prices dropped 26.1%, the seventh straight month of decline. If petroleum and coal product prices had been excluded, the IPPI would have increased 0.6% instead of declining 1.2%.

Lower prices for pulp and paper products, primary metal products and chemical products also contributed to the annual

decline in manufacturers' prices. This decline was partially offset by higher prices for motor vehicles, lumber products, and fruit, vegetable and feed products.

However, on a month-to-month basis, industrial prices were up 0.9% in January from December, after declining 0.9% in December from November. Rising prices for autos, trucks and other transportation equipment and primary metal products were the major contributors to this increase.

Manufacturers paid 13.0% less for their raw materials in January than they did a year earlier, the sixth consecutive month of decline. Mineral fuels (-25.9%) were responsible for most of the drop in the Raw Materials Price Index (RMPI). If mineral fuels had been excluded, the RMPI would have declined 2.0%.

(continued on page 6)

... Petroleum, coal product prices push down manufacturers' prices

On a monthly basis, raw materials prices were up 2.6% in January from December. Higher prices for mineral fuels, animal products and non-ferrous metals were the major contributors to the monthly increase.

In the RMPI, crude oil prices were 4.1% higher in January than in December, due in part to production cuts by the Organization of Petroleum Exporting Countries (OPEC). This increase was reflected in the IPPI; petroleum and coal product prices were up 0.7% from December.

From December to January, the value of the US dollar strengthened against the Canadian dollar, pushing up prices of commodities that are quoted in US dollars, notably automobiles and lumber. If the exchange rate had remained unchanged, the IPPI would have increased 0.4%. On a 12-month basis, the influence of the dollar was also evident. The IPPI was down 1.2% in January 2002 from January 2001, but without the exchange rate effect the IPPI would have decreased 2.7%.

Rising prices for motor vehicles pushed year-over-year prices up for finished goods. Prices for machinery equipment and tobacco products also contributed to the 1.7% increase from January 2001. Lower prices for petroleum products partly offset this increase. On a monthly basis, prices for finished goods were up 0.9% in January from December. Higher prices for motor vehicles and petroleum products were the major contributors to the increase.

Industrial product and raw materials price indexes, January 2002

	Index (1997=100)	% change, previous month	% change, previous year
Industrial Product Price Index (IPPI)	106.2	0.9	-1.2
IPPI excluding petroleum and coal products	106.0	0.8	0.6
Intermediate goods	102.5	0.8	-3.3
Finished goods	111.7	0.9	1.7
Raw Materials Price Index (RMPI)	103.2	2.6	-13.0
RMPI excluding mineral fuels	91.7	2.8	-2.0
Mineral fuels (crude oil)	127.9	2.1	-25.9
Vegetable products	89.5	1.0	8.4
Animals and animal products	106.7	3.7	1.7
Wood	79.8	-0.4	-13.2
Ferrous materials	89.0	2.8	5.7
Non-ferrous metals	81.8	7.1	-6.0
Non-metallic minerals	110.0	0.2	1.7

The January 2002 issue of *Industry price indexes* (paper: 62-011-XPB, \$22/\$217) is now available. For more information, contact the Client Services Unit (613-951-9606; fax: 613-951-1539; infounit@statcan.ca) or Danielle Gouin (613-951-3375; danielle.gouin@statcan.ca), Prices Division.

New from Statistics Canada

2001 Census: Population and dwelling counts

The first data from the 2001 Census covering population and dwelling counts will be available on March 12.

Detailed analysis of new census data on the nation's population will be available in a full-colour report, *A profile of the Canadian population: Where we live*, available on Statistics Canada's website (www.statcan.ca).

This document will contain an extensive analytical text in HTML format, illustrated by many full-colour maps, tables, charts and photographs; it can be printed in part or whole.

The report will provide clear, insightful and useful information and analysis on population counts, as well as trends in Canada's population growth and the factors behind it, with historical perspective. It will analyse changes in population for the provinces and territories; developments in metropolitan areas and cities and towns; and details on the urbanization of the population.

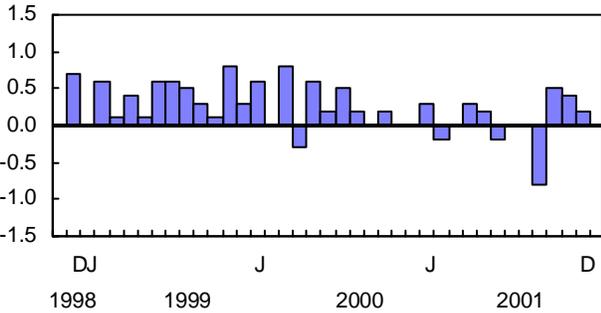
With this release, at 8.30 am Eastern time on March 12, more census data on population than ever before will be available to the public via Statistics Canada's website.

For more information, contact Media Relations (613-951-4636), Communications Division.

Current Trends

Gross domestic product

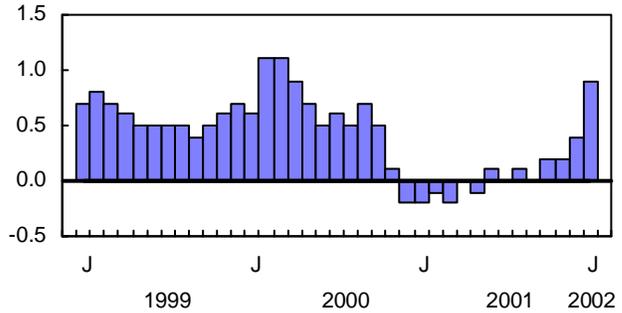
% change, previous month



Total economic activity advanced 0.2% in December, after rising 0.4% in November.

Composite index

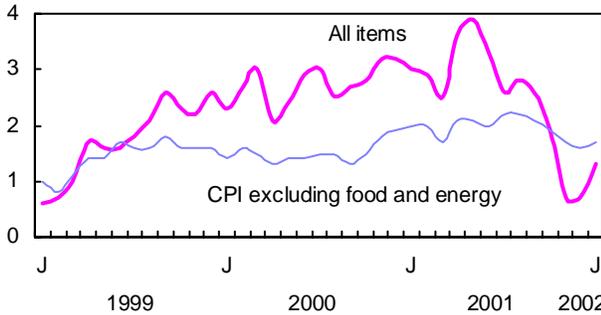
% change, previous month



The leading indicator gained 0.9% in January, due mainly to strength in household spending.

Consumer price index

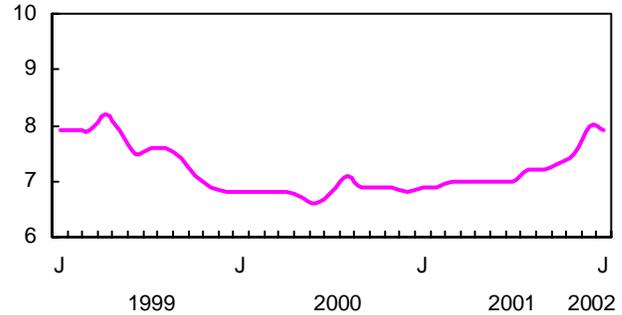
% change, previous year



Consumer prices for goods and services were 1.3% higher in January than they were a year earlier. Excluding food and energy, prices rose 1.7%.

Unemployment rate

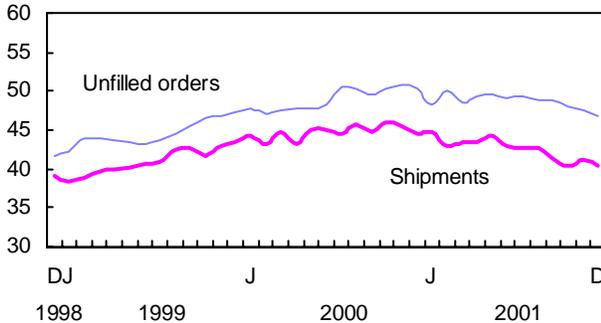
%



In January, the unemployment rate dipped 0.1 percentage points to 7.9%.

Manufacturing

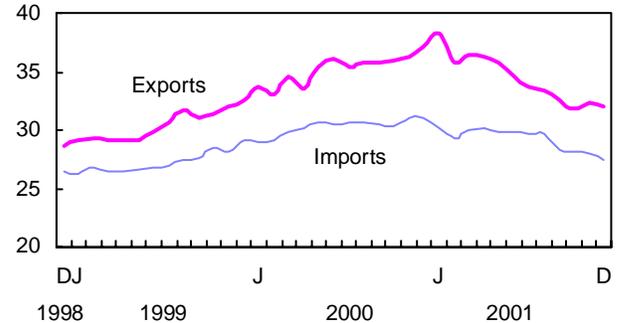
\$ billions



Manufacturers' shipments fell 1.8% in December to \$40.4 billion. The backlog of unfilled orders declined 1.5% to \$46.8 billion.

Merchandise trade

\$ billions



In December, the value of merchandise exports fell 1.2% to \$32.0 billion. Imports declined 1.8% to \$27.5 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	943.1	0.2%	0.7%
Composite Index (1992=100)	January	168.9	0.9%	1.3%
Operating profits of enterprises (\$ billions)	Q4 2001	33.8	-5.6%	-29.9%
Capacity utilization rate (%) ²	Q3 2001	79.4	-2.5†	-7.0†
DOMESTIC DEMAND				
Retail trade (\$ billions)	December	25.0	1.6%	5.8%
New motor vehicle sales (thousands of units)	December	145.7	0.9%	11.9%
Wholesale trade (\$ billions)	December	32.5	0.3%	1.8%
LABOUR				
Employment (millions)	January	15.2	0.5%	0.7%
Unemployment rate (%)	January	7.9	-0.1†	1.0†
Participation rate (%)	January	66.4	0.1†	0.3†
Average weekly earnings (\$)	December	671.43	0.10%	1.92%
Help-wanted Index (1996=100)	February*	124	-0.8%	-26.6%
Regular Employment Insurance beneficiaries (in thousands)	December	557.2	0.0%	16.9%
INTERNATIONAL TRADE				
Merchandise exports (\$ billions)	December	32.0	-1.2%	-13.8%
Merchandise imports (\$ billions)	December	27.5	-1.8%	-11.4%
Merchandise trade balance (all figures in \$ billions)	December	4.5	0.1	-1.6
MANUFACTURING				
Shipments (\$ billions)	December	40.4	-1.8%	-9.5%
New orders (\$ billions)	December	39.7	-2.5%	-9.9%
Unfilled orders (\$ billions)	December	46.8	-1.5%	-6.9%
Inventory/shipments ratio	December	1.56	0.02	0.11
PRICES				
Consumer Price Index (1992=100)	January	116.2	0.3%	1.3%
Industrial Product Price Index (1997=100)	January	106.2	0.9%	-1.2%
Raw Materials Price Index (1997=100)	January	103.2	2.6%	-13.0%
New Housing Price Index (1992=100)	December	107.3	0.2%	2.8%

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 Industrial Classification System (NAICS), which has replaced the 1980 Standard Industrial Classification.

Infomat

A weekly review

Editor: Lahouaria Yssaad; (613) 951-0627; lahouaria.yssaad@statcan.ca.

Head of Official Release: Madeleine Simard; (613) 951-1088;
madeleine.simard@statcan.ca.

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Products released from February 28 to March 6, 2002

SUBJECT AREA Title of product	Period	Catalogue number	Price (\$) (issue/subscription)
AGRICULTURE			
Farm product price index	December 2001	21-007-XIB	free
Fruit and vegetable production	February 2002	22-003-XIB	23/46
Rural and small town Canada analysis bulletin: Migration to and from rural and small town Canada	1966-1996	21-006-XIE	free
Stocks of frozen meat products	February 2002	23-009-XIE	free
ANALYTICAL STUDIES			
A comparison of Canada-U.S. economic growth in the information age	1981-2000	11F0027MIE02001	free
Winners and losers in the labour market of the 1990s		11F0019MIE01184	free
BALANCE OF PAYMENTS AND FINANCIAL FLOWS			
Canada's international transactions in securities	December 2001	67-002-XIB	14/132
Canada's international transactions in securities	December 2001	67-002-XPB	18/176
INCOME AND EXPENDITURE ACCOUNTS			
Estimates of labour income, monthly estimates	December 2001	13F0016DDB	125/500
Estimates of labour income, monthly estimates, tables and analytical document	December 2001	13F0016XPB	20/65
Financial flow accounts, quarterly estimates	Q4 2001	13-014-DDB	300/1200
Financial flow accounts, quarterly estimates, tables and analytical document	Q4 2001	13-014-PPB	50/180
Income and expenditure accounts, quarterly estimates	Q4 2001	13-001-DDB	125/500
Income and expenditure accounts, quarterly estimates, tables and analytical document	Q4 2001	13-001-PPB	50/180
INDUSTRY MEASURES AND ANALYSIS			
Gross domestic product by industry	December 2001	15-001-XIE	11/110
INTERNATIONAL TRADE			
Imports by commodity	December 2001	65-007-XMB	37/361
Imports by commodity	December 2001	65-007-XPB	78/773
Imports by country	Jan.-Dec. 2001	65-006-XMB	62/206
Imports by country	Jan.-Dec. 2001	65-006-XPB	124/412
LABOUR STATISTICS			
Employment, earnings and hours	December 2001	72-002-XIB	24/240
MANUFACTURING, CONSTRUCTION AND ENERGY			
Asphalt roofing	January 2002	45-001-XIB	5/47
Coal and coke statistics	December 2001	45-002-XIB	9/85
Electric power statistics	December 2001	57-001-XIB	9/85
Energy statistics handbook	December 2001	57-601-UPB	387
Energy statistics handbook	December 2001	57-601-XCB	284
Production and disposition of tobacco products	January 2002	32-022-XIB	5/47
Sawmills and planing mills	December 2001	35-003-XIB	9/86
METHODOLOGY			
Survey methodology	December 2001	12-001-XPB	47
PRICES			
Industry price indexes	December 2001	62-011-XPB	22/217

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