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A Weekly Review

Friday, March 28, 2003

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◆ Renewed growth for retail sales

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◆ Innovative work practices reduce labour turnover in some sectors

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◆ Earnings higher in the computer and telecommunications industries

Average earnings in the computer and telecommunications industries were higher than in the other industries group. Moreover, from 1997 to 2002, the gap in average earnings between workers in these industries and the rest of the economy continued to widen, according to a new study.

Gas, fuel oil prices drive inflation up a notch

High energy prices, especially for gasoline, drove the inflation rate as measured by the Consumer Price Index (CPI) up slightly to 4.6% in February from 4.5% the month before. The all-items CPI was the highest since September 1991.

However, if rising energy prices were excluded, the CPI would have been a substantially lower 3.4% in February.

Between February 2002 and February 2003, energy prices jumped 19.7%. Gasoline prices, which rose 32.1%, accounted for three-quarters of this increase. Accounting for the remainder were a 47.8% jump in fuel oil prices, a 6.8% increase in natural gas, and a 2.0% increase in electricity.

However, much of these increases was attributable to what is known as the "base effect". Price comparisons in February 2003 are based on prices in February 2002 when energy prices were plunging after the collapse of worldwide demand for crude oil in the wake of terrorist attacks in the United States.

(continued on page 2)

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

	All items	Food	Shelter	Transportation	Energy
Canada	4.6	1.2	3.2	13.0	19.7
Newfoundland and Labrador	5.0	0.3	5.5	18.1	15.9
Prince Edward Island	6.7	1.1	6.7	16.8	26.8
Nova Scotia	6.8	2.4	7.1	17.3	28.0
New Brunswick	7.2	2.1	4.5	21.6	23.2
Quebec	4.3	0.7	4.2	12.9	19.4
Ontario	4.4	2.2	2.3	12.6	18.4
Manitoba	4.1	1.2	2.6	9.5	20.7
Saskatchewan	4.5	1.4	2.2	10.6	14.5
Alberta	6.9	0.5	6.7	18.1	28.0
British Columbia	3.2	0.6	1.6	9.4	18.2
Whitehorse	4.7	1.9	2.6	13.1	18.1
Yellowknife	3.9	1.5	3.7	6.3	22.1



Gas, fuel oil prices... (continued from page 1)

This "base effect" is expected to fade by time CPI data for March 2003 are released. The index used as the base for comparison will have returned to a level comparable to that of September 2001.

The core inflation rate, which excludes volatile prices for food and energy among others, and which the Bank of Canada focusses on, increased 3.1% in February, slightly slower than the 3.3% increase the previous month.

On a month-to-month basis, the all-items CPI advanced 0.7% from January to February this year, with increases in all major categories except food.

Consumers paid 7.0% more for gasoline in February than in January, after a 6.2% increase the previous month. Price increases ranged from 2.1% in Newfoundland and Labrador to 9.2% in Manitoba. The steady rise in crude oil prices since November 2002 contributed to the price hikes.

The price of fuel oil increased 11.9%, the largest gain since the 16.0% increase in September 2000. In Newfoundland and Labrador, the price of fuel oil rose only 1.4%. Increases in the other Atlantic provinces, Quebec and Ontario ranged from 11.0% to 15.9%. Price increases in the western provinces ranged from 5.0% to 6.6%.

The price of cigarettes in Canada rose 2.1% in February, mainly the result of an increase in manufacturers' prices and higher taxes on tobacco products in British Columbia.

Consumers paid 5.8% less for fresh vegetables and 4.1% less for fresh fruit. These declines were due mainly to favourable weather conditions in exporting countries, as well as to simultaneous harvests in various nations.

The February 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) or Joanne Moreau (613-951-7130), Prices Division. (See also "Current trends" on page 6.)

Heavy retirements lead to reduced foreign holdings of bonds

Foreign holdings of Canadian bonds declined by \$3.1 billion in January, as large retirements of foreign-held Canadian bonds amounting to \$6.0 billion followed the record \$7.9 billion in December.

The heavy retirements came as new bonds sold in foreign markets amounted to just \$900 million in January, the lowest level in over two years. The bulk of January's retirements were provincial issues, in contrast with December's, which were more evenly spread over most governments and the corporate sector.

Foreign investment of \$1.5 billion in the secondary bond market in January was a continuation of the investment in that market totalling \$14.5 billion for all of 2002.

In January, foreign investors added \$700 million to their holdings of Canadian money market paper, the fourth consecutive investment in that market since October 2002. Two-thirds of the accumulated \$4.7 billion in these four months came from the United States, where short-term interest rates have generally declined more than those in Canada.

Canadian stock prices (S&P/TSX composite index) lost 0.7% in January 2003, reversing a similar gain in December. Although prices gained 7.0% over the last three months of 2002, the S&P/TSX composite index still recorded an overall loss of 14.0% for 2002. In comparison, American stock prices did not perform as well. They declined 2.7% in January, adding to the 6.0% decline in December.

The January 2003 issue of Canada's international transactions in securities (Internet: 67-002-XIE, \$14/\$132) is now available. For more information, contact Donald Granger (613-951-1864), Balance of Payments Division.

Demand for legal aid remains stable, but spending rises

Legal aid spending continued to grow, but the demand for legal aid services remained stable in the fiscal year 2001/02. Total legal aid expenditures reached just over \$593 million in 2001/02, the equivalent of \$19 per capita. Total spending in 2001/02 increased 16% from the previous year.

Legal aid plans received 839,000 applications for assistance in 2001/02, virtually unchanged from the previous year. The number of approved legal aid applications decreased 1% to 511,000. This was 34% below the peak of 769,000 in 1992/93.

Governments, both provincial/territorial and federal, continue to be the major source of funding for legal aid plans. They contributed \$534 million in 2001/02, or about 90% of total revenues. The remainder came from client contributions and cost recoveries, legal profession contributions and other sources.

The annual report Legal aid in Canada: Resource and caseload statistics, 2001/02 (Internet: 85F0015XIE, \$20) is now available. For more information, contact the Canadian Centre for Justice Statistics (1-800-387-2231; 613-951-9023).

Renewed growth for retail sales

Retail sales advanced 0.7% in January to \$26.0 billion. This followed essentially unchanged sales in December and a decline in November. Excluding sales by motor and recreational vehicle dealers, retail sales increased 1.5% in January.

In 2002, despite a lacklustre holiday season, retailers posted their second largest annual sales gain in five years, with an increase of 6.0% from 2001. However, retail sales growth was modest over much of 2002; the annual growth stemmed from gains observed in the fall of 2001 and January 2002.

In constant dollars, retail sales remained essentially unchanged in January (+0.1%). Consumers were faced with higher prices in the auto and food sectors in January.

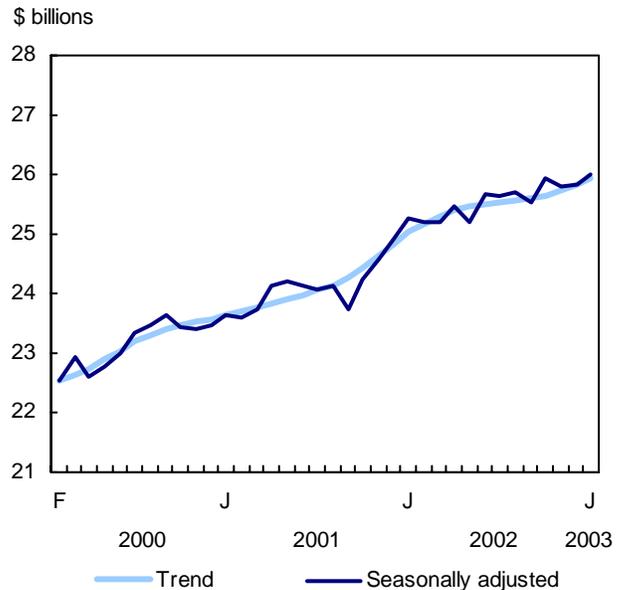
In January, the clothing sector posted its first monthly sales gain (+3.1%) in three months, bringing sales back to their October 2002 level. Increases in consumer purchases were observed in all types of clothing stores. January's gain was strongest in men's clothing stores and shoe stores. Women's clothing stores and stores in the "other clothing" category were affected by falling prices in January.

After two months of weak results, retailers in the general merchandise sector enjoyed a 1.8% sales increase in January. This was the strongest monthly sales gain for general merchandisers in seven months. Within this sector, both department stores (+2.1%) and other general merchandise stores (+1.5%) posted sales increases in January.

Retail sales, January 2002 Seasonally adjusted

	\$ millions	% change, previous month	% change, previous year
Canada	25,995	0.7	2.9
Newfoundland and Labrador	427	-2.0	0.6
Prince Edward Island	111	0.2	0.3
Nova Scotia	759	-1.6	-0.6
New Brunswick	601	-1.6	-2.0
Quebec	5,908	0.5	4.5
Ontario	9,813	0.4	1.8
Manitoba	888	-0.4	2.0
Saskatchewan	765	-0.4	4.1
Alberta	3,187	2.4	3.5
British Columbia	3,440	2.1	5.1
Yukon	33	1.8	-9.7
Northwest Territories	45	0.5	10.0
Nunavut	19	-0.6	16.4

Retail sales



Increased sales in gasoline service stations and automotive parts, accessories and service stores led to a 0.8% sales increase in the auto sector in January. Sales in gasoline service stations were boosted by a 6.2% price jump at the pumps. Retailers of automotive parts, accessories and services posted their largest monthly sales gain (+5.9%) in nine months.

Motor and recreational vehicle dealers experienced a 1.6% sales decline in January. Sales by motor and recreational vehicle dealers have been slowly declining since early 2002; nevertheless, sales remain at historically high levels after jumping 7.3% in the fourth quarter of 2001.

Consumers reduced spending in furniture stores by 1.7% in January, after sales increases that averaged 0.9% in each of the previous five months. Furniture stores led other retailers in sales growth in 2002 and have shown annual gains of at least 8.0% since 1997.

In January, retail sales bounced back 2.4% in Alberta and 2.1% in British Columbia from sizable declines in December. Retailers in Quebec (+0.5%) and Ontario (+0.4%) posted similar sales increases in January.

*The January 2003 issue of **Retail trade** (Internet: 63-005-XIB, \$16/\$155) is now available. For more information, contact Paul Gratton (613-951-3541; paul.gratton@statcan.ca), Distributive Trades Division.*

Innovative work practices reduce labour turnover in some sectors

Innovative work practices, such as teamwork, profit sharing and job rotation, generally help employers keep workers from quitting their jobs in the highly skilled service sector, according to a new study. But they don't have the same impact in manufacturing.

In manufacturing, establishments that had innovative work practices did not have lower labour turnover than others, the study showed. For instance, manufacturing plants which combined teamwork and profit sharing lost 14% of their employees, compared with 11% for plants with no innovative work practices.

On the other hand, firms in the services sector that employed a highly skilled workforce and used some innovative work practices did retain a greater proportion of their employees than others.

In 1999, those which had teamwork and profit-sharing plans lost about 4% of their employees through resignations. In contrast, those with no innovative work practices lost a much greater proportion of their employees, about 16%.

In the low-skilled service sector, workplaces that had teamwork and profit-sharing plans retained a greater proportion of their workforce than other establishments. In 1999, those that combined teamwork and profit sharing lost 13% of their workforce; those with no innovative work practices saw 19% of their workforce leave.

One possible explanation for these different patterns across the three sectors is that innovative work practices might be more successful in reducing labour turnover in firms which employ a highly skilled workforce, have jobs requiring strong conceptual and analytical skills and de-emphasize repetitive tasks.

Average quit rates of establishments, 1999

	Industry			
	Manu- facturing	High- skilled services	Low- skilled services	All industries
	%			
Innovative work practices				
Teamwork and flexible job design	12	3	14	12
Teamwork and profit sharing	14	4	13	11
Teamwork and merit pay/skill-based pay	13	4	13	10
Teamwork and formal training on teamwork	16	6	15	13
No innovative work practices	11	16	19	16

It has been argued that firms must combine several human resource practices to retain a greater proportion of their workforce. The study shows, however, that few establishments combine innovative work practices on a formal basis.

While 25% of workplaces had some form of teamwork in 1999, about one-third had flexible job design. Slightly more than 20% had profit-sharing plans for some of their non-managerial employees. However, only 6% combined these three practices.

This finding suggests that either a minority of businesses find it profitable to formally adopt combinations of these practices, or that several workplaces do so, but perhaps on an informal basis.

*The research report **Alternative work practices and quit rates: Methodological issues and empirical evidence for Canada** (11F0019MIE, no. 199, free) is now available on Statistics Canada's website (www.statcan.ca). For more information, contact René Morissette (613-951-3608), Business and Labour Market Analysis Division.*

Canadian business patterns

Canadian business patterns (CBP) on CD-ROM, which provides counts of active business establishments on the basis of several variables, such as geography and employment size, is now available.

Data are presented by the 1996 Standard Geographical Classification, by both the 1980 Standard Industrial Classification (SIC) and the North American Industry Classification System (NAICS 2002).

In December, Canada had 2,204,782 active business establishments, compared with 2,173,598 in June 2002.

Since the June 2002 issue, the new version of the North American Industry Classification has been used in the CBP. A concordance table indicating the relationship between NAICS 1997 and NAICS 2002 is included with the CD-ROM, along with the concordance table between SIC and NAICS 2002.

*The CD-ROM **Canadian business patterns** (61F0040XCB) is now available. Cost of data varies from \$150 to \$2,000, depending on the complexity of the request. For more information, contact Collette Lachance (613-951-0389) or Beau Cinnamon (613-951-9021), Business Register Division.*

Earnings higher in the computer and telecommunications industries

Average earnings in the computer and telecommunications (CT) industries were higher than in the other industries group. Moreover, from 1997 to 2002, the gap in average earnings between workers in CT industries and the rest of the economy continued to widen, according to a new study.

In 2002, men working in the CT industries earned an average of over \$1,000 every week (before taxes and other deductions), compared with the average of about \$750 for men working in the all other industries group.

Although women had lower earnings than men did in both the CT industries and the all other industries group, women's earnings in the CT industries were higher than in the rest of the economy. In fact, women's earnings in the CT industries were comparable to those of men in all other industries.

The typical worker in computer and telecommunications industries is most likely to be a highly-educated man in his mid-30s, holding a full-time job and working longer hours than many other workers.

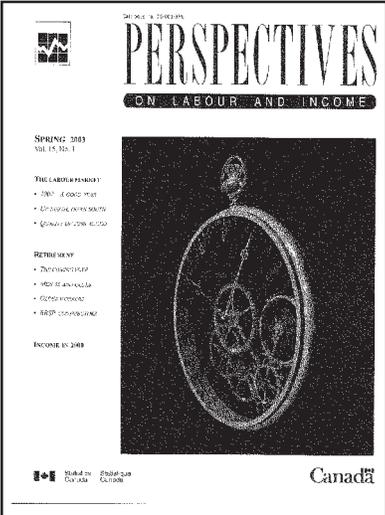
In 2002, just over four out of every 10 men in CT industries were in professional occupations. Women made some substantial gains during the 1990s. By 2002, 25% of women in CT industries worked in professional occupations, just above the 24% who worked in clerical positions.

CT workers tend to be younger than those in the rest of the economy. In 2002, the average age of a CT worker was 37.1 years old, nearly a year younger than workers in all other industries.

The number of people with a university degree working in CT industries increased three times as fast as the number of university graduates working in the rest of the economy during the 1990s.

CT industries are a subset of the information and communications technology sector, which contributed \$58.7 billion to Canada's economic output in 2002. This represented 7% of business sector GDP. In 2002, CT employment accounted for just under 4% of total employment.

*For further detail, see the new issue of the **Connectedness series: A profile of employment in computer and telecommunications industries** (56F0004MIE, free) on Statistics Canada's website (www.statcan.ca). For more information, contact Chantal Vaillancourt (613-951-2733), Centre for Education Statistics.*



Perspectives on labour and income

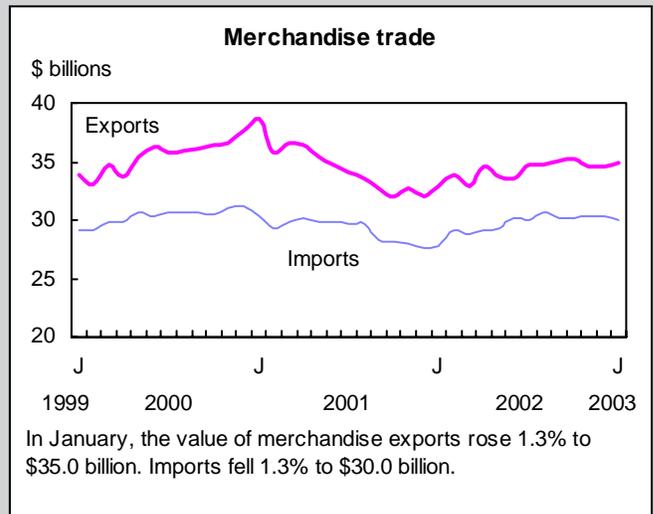
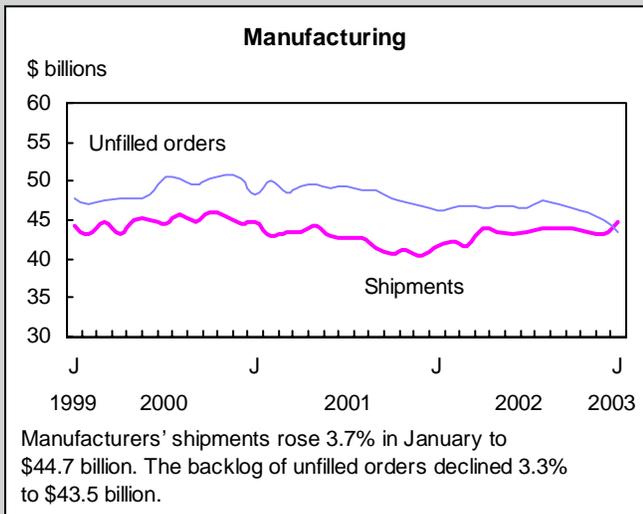
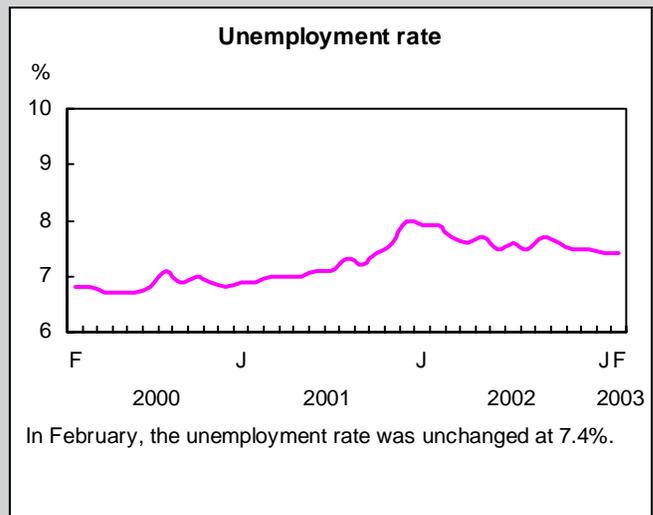
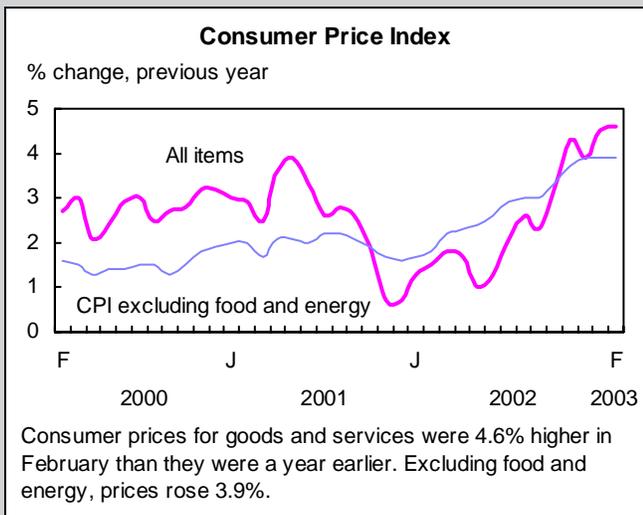
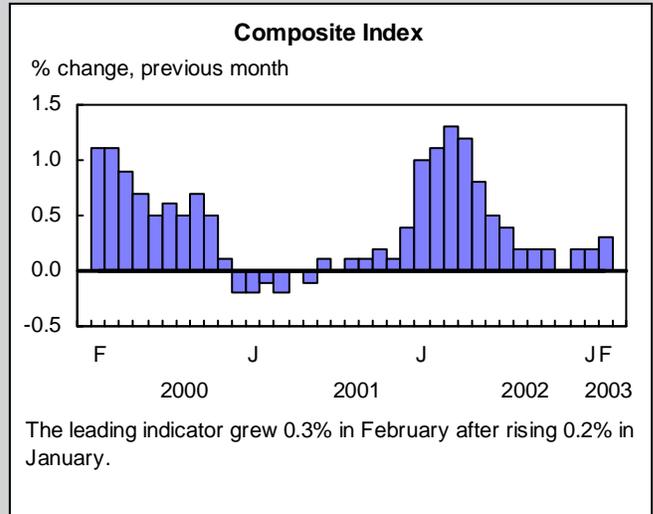
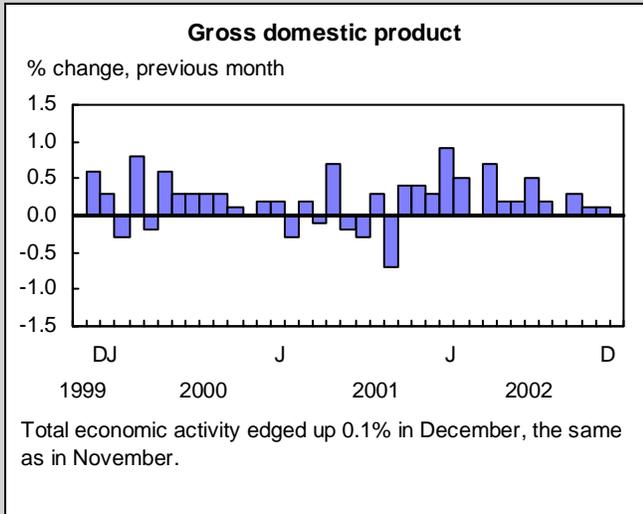
The Spring 2003 edition of *Perspectives on labour and income* is now available. Two articles, "The labour market: Up north, down south" and "2002 — a good year in the labour market," examine the divergent labour market trends in Canada and the United States in 2002. "Quality of jobs added in 2002" focusses on the types of jobs created in Canada during this period.

Older workers and their influence on the labour market now and in the future is another theme in this issue. "The retirement wave" examines the industries and occupations likely to be most affected as baby boomers retire. "Men 55 and older: work or retire?" and "Older workers and the labour market" explore various characteristics of older workers.

Rounding out the issue, "Profiling RRSP contributors" examines why one person is more likely than another to contribute to an RRSP, and "2000 income: An overview" provides a brief look at family incomes in 2000 and changes since 1980.

*The Spring 2003 issue of **Perspectives on labour and income** (paper: 75-001-XPE, \$18/\$58) is now available. For more information, contact Henry Pold (613-951-4608; henry.pold@statcan.ca), Labour and Household Surveys Analysis 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 (\$ billions, 1997) ¹	December	989.2	0.1%	3.8%
Composite Index (1992=100)	February	180.6	0.3%	5.7%
Operating profits of enterprises (\$ billions)	Q4 2002	41.9	5.1%	32.8%
Capacity utilization rate (%) ²	Q4 2002	82.9	-0.2†	2.5†
DOMESTIC DEMAND				
Retail trade (\$ billions)	January*	26.0	0.7%	2.9%
New motor vehicle sales (thousands of units)	January	129.0	-14.1%	-11.8%
Wholesale trade (\$ billions)	January	36.8	1.8%	8.6%
LABOUR				
Employment (millions)	February	15.7	0.4%	3.4%
Unemployment rate (%)	February	7.4	0.0†	-0.4†
Participation rate (%)	February	67.5	0.2†	1.1†
Average weekly earnings (\$)	January*	687.44	-0.08%	1.83%
Help-wanted Index (1996=100)	February	111.4	-0.2%	-11.5%
Regular Employment Insurance beneficiaries (in thousands)	January*	529.7	-3.3%	-5.6%
INTERNATIONAL TRADE				
Merchandise exports (\$ billions)	January	35.0	1.3%	6.3%
Merchandise imports (\$ billions)	January	30.0	-1.3%	8.0%
Merchandise trade balance (all figures in \$ billions)	January	4.9	0.8	-0.2
MANUFACTURING				
Shipments (\$ billions)	January	44.7	3.7%	6.9%
New orders (\$ billions)	January	43.1	2.9%	4.8%
Unfilled orders (\$ billions)	January	43.5	-3.3%	-5.8%
Inventory/shipments ratio	January	1.41	-0.06	-0.08
PRICES				
Consumer Price Index (1992=100)	February*	122.3	0.7%	4.6%
Industrial Product Price Index (1997=100)	February*	109.2	0.6%	2.3%
Raw Materials Price Index (1997=100)	February*	128.9	3.1%	22.6%
New Housing Price Index (1992=100)	January	113.1	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.

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A weekly review

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SUBJECT AREA Title of product	Period	Catalogue number	Price (\$) (issue/subscription)
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Cereals and oilseeds review	January 2003	22-007-XIB	11/112
Cereals and oilseeds review	January 2003	22-007-XPB	15/149
ANALYTICAL STUDIES			
Life after welfare: The economic well-being of welfare leavers in Canada during the 1990s		11F0019MIE	free
BALANCE OF PAYMENTS AND FINANCIAL FLOWS			
Canada's international transactions in securities	January 2003	67-002-XIE	14/132
CANADIAN CENTRE FOR JUSTICE STATISTICS			
Juristat: Adult criminal court statistics, Vol. 23, no. 2		85-002-XIE	8/70
Juristat: Adult criminal court statistics, Vol. 23, no. 2		85-002-XPE	10/93
Legal aid in Canada: resources and caseload statistics	2001-2002	85F0015XIE	20
CURRENT ECONOMIC ANALYSIS			
Canadian economic observer	March 2003	11-010-XIB	17/170
Canadian economic observer	March 2003	11-010-XPB	23/227
DISTRIBUTIVE TRADES			
Retail trade	January 2003	63-005-XIB	16/155
Wholesale trade	January 2003	63-008-XIB	14/140
HOUSING, FAMILY AND SOCIAL STATISTICS			
Disability supports in Canada	2001	89-580-XIE	free
Disability supports in Canada — tables	2001	89-581-XIE	free
LABOUR AND HOUSEHOLD SURVEYS ANALYSIS			
Perspectives on labour and income	March 2003	75-001-XIE	5/48
Perspectives on labour and income	Spring 2003	75-001-XPE	18/58
MANUFACTURING, CONSTRUCTION AND ENERGY			
Mineral wool including fibrous glass insulation	February 2003	44-004-XIB	5/47
Monthly Survey of Manufacturing	January 2003	31-001-XIB	15/147
Primary iron and steel	January 2003	41-001-XIB	5/47
PRICES			
Industry price indexes	December 2002	62-011-XPB	22/217
The Consumer Price Index	February 2003	62-001-XIB	8/77
The Consumer Price Index	February 2003	62-001-XPB	11/103
TRANSPORTATION			
Monthly railway carloadings	November 2002	52-001-XIE	8/77

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Calendar of key releases: April 2003

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