



Infomat

A Weekly Review

Friday, May 3, 2002

INSIDE

◆ **Composite Index shows largest gain in 15 years**

The growth of the leading index accelerated to 1.3% in March, its largest gain in 15 years. This occurred after the index had turned up rapidly from 0.1% in November to 1.1% in February. Only one component fell, compared with two in February. The manufacturing sector lagged behind, as it usually does early in an upswing.

◆ **Canadian investors stock up on foreign securities**

Canadian investors added \$10.1 billion to their holdings of foreign securities in February, the second biggest monthly increase on record. Two-thirds of the \$6.1 billion worth of foreign stocks acquired came from an exchange of shares in the foreign takeover of a Canadian firm.

◆ **Manufacturers' month-to-month prices continue to advance**

On a month-to-month basis, industrial prices were up 0.6% in March from February, after advancing 0.4% in February from January. Rising prices for petroleum, lumber and primary metal products were the major contributors to this increase.

◆ **Average weekly earnings highest in accommodation and food services**

Average weekly earnings for all employees increased \$2.19 in February to \$674.50. Accommodation and food services (+6.7%) had the strongest year-over-year weekly earnings growth rate of all industries, mostly due to hourly earnings gains for hourly paid employees.

Manufacturers provide impetus for surge in GDP

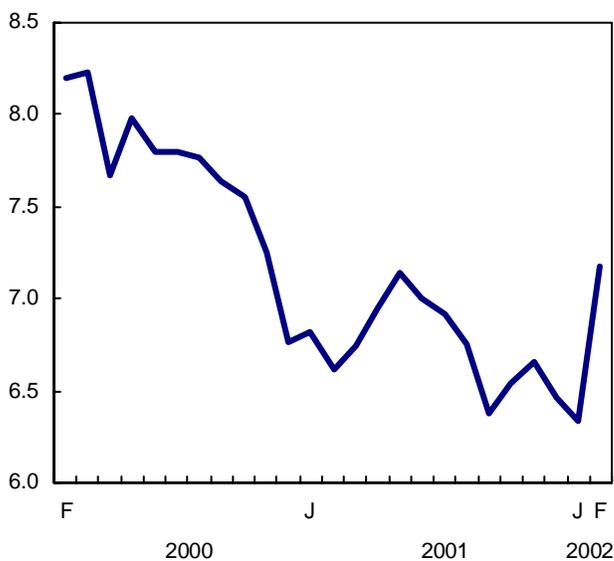
The manufacturing sector provided the single biggest push in February as gross domestic product experienced its largest back-to-back monthly increases since the end of 1999.

GDP, the broadest measure of economic activity, grew 0.5% in February, maintaining momentum from the month before when economic output increased 0.6%. Economic output has now increased for five straight months.

The nation's manufacturing sector, which continued to find its footing after being hammered during last year's economic downturn, posted a 2.3% gain, the second consecutive monthly increase. However, output in manufacturing was still 3.7% short of its peak in August 2000.

Motor vehicle production

\$ billions 1997



(continued on page 2)



Manufacturers provide impetus... (continued from page 1)

Manufacturing accounted for about 17% of the nation's total industrial output of \$953.1 billion in February, on par with the annual average during the past two years.

The advance in manufacturing was widespread, although nearly one-third of the increase was attributable to the motor vehicle assembly and parts fabrication industries. Producers of paper, chemical, wood, computer and electrical products all reported significant gains in February. The climb in manufacturing production led to higher activity in generation of electricity, natural gas distribution, and truck and rail transportation services.

The torrid pace of construction in the nation's housing industry also boosted output. Residential construction increased 0.9%, the fifth consecutive monthly increase. Output rose in many industries that feed housing construction, such as electric lighting products, glass, asphalt, paint, gypsum and other construction materials.

Manufacturers in the forestry and wood product sectors expanded output significantly as a result of the strong domestic housing market and the removal of duties on exports to the United States.

The hot housing market also contributed to a 1.7% gain in the real estate agent and brokerage industry in the wake of record-breaking sales.

Bursting with confidence, consumers purchased new homes in record numbers, encouraged by historically low interest rates and large employment gains. The rise in residential construction was due mainly to an increase in single-family dwellings as opposed to multiple-dwelling units.

Furniture retailers and wholesales also saw higher activity on the back of stronger home sale markets. Furniture makers, in turn, expanded output by 3.1%.

After four months of strong spending, consumers pulled back somewhat in February as retailing activity slipped 0.6%. However, activity remained 6% higher than in February 2001.

A string of record car sales increases, sparked by favourable financing offers, also ended in February when sales dipped 0.7%. However, sales by motor and recreational vehicle dealers were still 17% above those in February 2001.

Production of motor vehicles, meanwhile, surged 13.2% as exports of cars and trucks roared ahead 18% in February.

The economy showed weaknesses in only a handful of areas. A three-week strike by Alberta teachers left output down 1.2% in the education sector.

Industries in the travel sector did not fare well, as output in air transportation was flat. Travel agencies, restaurants and hotels reported lower activity.

The arts and entertainment sector suffered a setback as spectator sports were weakened by a shutdown of the National Hockey League for 10 days during the Winter Olympics.

*The February 2002 issue of **Gross domestic product by industry** (Internet: 15-001-XIE, \$11/\$110) will be available soon. A print-on-demand version is available at a different price. For more information, contact Jo Ann MacMillan (613-951-7248; joann.macmillan@statcan.ca), Industry Measures and Analysis Division. (See also "Current trends" on page 7.)*

Financial performance indicators for Canadian business

The 2001 edition of *Financial performance indicators for Canadian business (FPI)* covering medium-sized and large businesses in Canada is now available. *FPI* is an authoritative reference source of key financial ratios for 144 industries.

The indicators are designed to serve as financial performance benchmarks against which individual firms and industries can be compared. It allows firms to precisely position themselves within their peer group. The enhancements to this edition include classifying industries according to the North American Industry Classification System and providing three reference years of data (2000, 1999 and 1998). The CD-ROM includes an interactive benchmarking module to compare their firm's performance to that of their industry and to address some business issues such as business investment opportunities, financial report cards and business risk.

Financial performance indicators for Canadian business (CD: 61F0058XCB, \$225; Microfiche: 61F0058XME, \$750) is now available. Customized data extractions are also available. For more information, contact Jeannine D'Angelo (1-800-263-1136; 613-951-2604; jeannine.dangelo@statcan.ca), Industrial Organization and Finance Division.

Composite Index shows largest gain in 15 years

The growth of the leading index accelerated to 1.3% in March, its largest gain in 15 years. This occurred after the index had turned up rapidly from 0.1% in November to 1.1% in February.

Only one component fell, compared with two in February. The manufacturing sector lagged behind, as it usually does early in an upswing.

Household demand remained a pillar of strength, especially for durable goods, as housing eased slightly from its unsustainable increases at the beginning of 2002.

The moderation in the housing index originated in sales of existing homes, which retreated from their record highs. However, housing starts rebounded in March, nearing the 10-year peak they set in January. The rise was led by Alberta, which has the fastest-growing population and incomes in the country.

Manufacturing remained the slowest sector to recover, with one component down and two unchanged. This followed the pattern of past business cycles, when these components had long lead times in signalling downturns but lagged behind in upturns.

For example, the ratio of shipments to stocks started to fall in October 2000, well before the other components, and has not yet started to recover. The lag originates in inventories, which firms often run down in the initial stages of a recovery before raising output. The average work week also was unchanged, and new orders continued to edge down.

The growth of the US leading indicator was steady at 0.6%, with gains spreading to all 10 components. As in Canada, the components related to household demand posted the largest increases.

*For more information on the economy, the April 2002 issue of **Canadian economic observer** (paper: 11-010-XPB, \$23/\$227) is now available. For more information, contact Francine Roy (613-951-3627), Current Economic Analysis Group. (See also "Current trends" on page 7.)*

Foreign affiliate trade statistics

Canadian companies deliver services to their customers abroad primarily through their foreign affiliates, while goods are supplied largely by exports, according to a new study of trade and investment statistics for 1999.

Canada is one of the world's most trade-oriented nations, and it is one of the most direct investment-oriented. Companies can choose to compete in foreign markets either by producing goods or services in Canada and exporting them to foreign markets, or by establishing a commercial presence abroad through foreign affiliates.

In 1999, Canadian companies exported \$52 billion in services. However, sales for foreign affiliates in the services sector amounted to \$124 billion, more than twice the amount of cross-border exports. In contrast, exports of goods totalled \$365 billion, and sales from goods-producing foreign affiliates amounted to \$177 billion — just under one-half the cross-border exports.

Foreign affiliates of Canadian companies had total sales abroad of just over \$300.4 billion in 1999, and employed about 772,000 people. Service providers accounted for about 40% of both sales and employment. About two-thirds of total sales were in the United States.

Four industrial sectors accounted for 63% of reported sales for service providers in 1999: information and cultural activities; finance; insurance; and transportation and warehousing.

*The research paper **Foreign affiliate trade statistics, 1999: How goods and services are delivered in international markets** (11F0027MIE no. 4, free) is now available on Statistics Canada's website (www.statcan.ca). From the Our products and services page, choose Research papers (free), then National accounts. For more information, contact Colleen Cardillo (613-951-3486; colleen.cardillo@statcan.ca), Balance of Payments Division.*

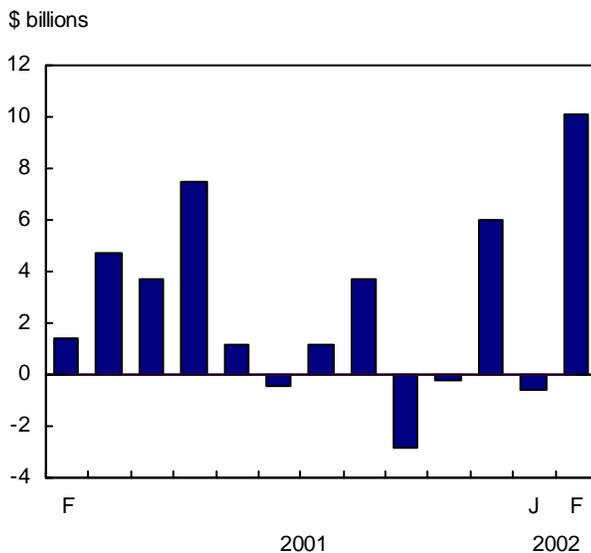
Canadian investors stock up on foreign securities

Canadian investors added \$10.1 billion to their holdings of foreign securities in February, the second largest monthly increase ever. Canadians added heavily to their holdings of both foreign stocks (\$6.1 billion) and foreign bonds (\$4.0 billion) in February.

The take-over of a Canadian company by a foreign company via a share exchange accounted for two-thirds of the increase in stocks. Aside from this transaction, Canadian investors also acquired \$2.1 billion worth of foreign equities in the secondary market, as the end of the current Registered Retirement Savings Plan season neared. It was the largest investment in the secondary market in nine months and was evenly split between U.S. and overseas shares.

The Canadian investment of \$4.0 billion in foreign bonds easily surpassed the previous high of \$2.9 billion in November 1999. Over 90% of this latest investment was directed to U.S. treasuries, and the balance to U.S. corporate bonds.

Canadian investment in foreign securities¹



¹ Includes bonds and stocks.

Related market information

Similar marginal increases in both Canadian and US short-term interest rates in February resulted in an unchanged differential, continuing to favour investment in Canada by 32 basis points.

This followed a string of declines throughout 2001, when short-term rates fell over 350 basis points to below 2%, a level not seen in more than 40 years. Long-term rates on 10-year government bonds, however, declined further on both sides of the border.

Canadian stock prices (TSE 300 Composite Index) closed February 0.1% below January. The index closed down 0.5% in January, after rising 12.4% over the last three months of 2001. American stock prices (Standard & Poor's Index) also declined in February for the second month in a row.

The Canadian dollar closed the month of February at a record low 62.42 US cents, down more than one-half cent from January.

Foreign investors added \$1.3 billion to their holdings of Canadian bonds in February. Foreign investors returned to the secondary bond market with an investment of \$2.3 billion, after having divested \$3.0 billion in this market in December and January. In the primary market, retirements of foreign-held Canadian bonds exceeded new issues floated in foreign markets for the first time in five months (\$1.0 billion).

Corporate new issues sold in foreign markets fell to \$0.3 billion, the first month with less than a billion dollars worth of such new issues in over a year. In the previous 13 months, corporations sold over \$60 billion in new issues in foreign markets.

Foreign holding of Canadian stocks dropped marginally for the second consecutive month. Underlying February's divestment was the acquisition of a Canadian company whose foreign-held shares were exchanged for shares of the foreign direct investor. As well, a foreign investment of \$0.6 billion was made in secondary market shares, the first since October 2001.

Foreign investors divested \$0.3 billion worth of Canadian money market paper in February, largely corporate paper.

The February 2002 issue of *Canada's international transactions in securities* (Internet: 67-002-XIB, \$14/\$132; paper: 67-002-XPB, \$18/\$176) is now available. For more information, contact Donald Granger (613-951-1864), Balance of Payments Division.

Manufacturers' month-to-month prices continue to advance

Manufacturers' prices, as measured by the Industrial Product Price Index (IPPI), were up 0.6% in March from February, after advancing 0.4% in February from January. Rising prices for petroleum, lumber and primary metal products were the major contributors to this increase.

On an annual basis, however, manufacturers' prices fell 1.2% in March compared with March 2001, their sixth consecutive decline, as petroleum and coal product prices fell 14.9%, the ninth successive year-over-year decline. If petroleum and coal product prices had been excluded, the IPPI would have fallen 0.2% instead of 1.2%.

Industrial product and raw materials price indexes, March 2002

	Index (1997=100)	% change, previous month	% change, previous year
Industrial Product Price Index (IPPI)	107.2	0.6	-1.2
IPPI excluding petroleum and coal products	106.7	0.2	-0.2
Intermediate goods	103.7	0.7	-2.6
Finished goods	112.4	0.4	0.8
Raw Materials Price Index (RMPI)	111.0	5.5	-7.0
RMPI excluding mineral fuels	92.9	0.4	-4.5
Mineral fuels (crude oil)	150.2	13.1	-10.1
Vegetable products	89.7	0.1	9.1
Animals and animal products	109.0	-0.5	-5.5
Wood	79.9	0.3	-14.1
Ferrous materials	90.2	0.6	4.0
Non-ferrous metals	83.2	2.6	-5.1
Non-metallic minerals	109.1	0.1	0.1

Price decreases for pulp and paper products, chemical products and primary metal products also contributed to the annual decline in manufacturers' prices. This decline was partly offset by higher prices for lumber products and motor vehicles.

Manufacturers paid 7.0% less for their raw materials than they did in March 2001, the eighth consecutive period of annual decline. Mineral fuels (-10.1%) were responsible for most of the retreat in the Raw Materials Price Index (RMPI). Wood products, animal products and non-ferrous metals also lost ground.

On a monthly basis, raw materials prices were up 5.5% in March from February. Higher prices for mineral fuels and non-ferrous metals were the major contributors to this increase. Lower prices for animal products slightly offset this monthly gain.

Rising prices for motor vehicles pushed up year-over-year prices for finished goods. Prices for machinery and equipment, tobacco products and electrical and telecommunications products also contributed to the 0.8% increase from March 2001.

On a monthly basis, prices for finished goods were up 0.4% in March from February. Higher prices for petroleum products were slightly offset by lower prices for motor vehicles.

Producers of intermediate goods received 2.6% less for their goods in March than they did in March 2001. Lower prices for petroleum products, pulp and paper products and chemical products were slightly offset by higher prices for lumber products and motor vehicles.

Prices for input goods were up 0.7% from February. Higher prices for petroleum products and lumber products were the major contributors. Lower prices for pulp and paper products partly offset this increase.

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

Services indicators

Fourth quarter 2001

The services industries generated an unprecedented 68.8% share of Canada's economic output in the fourth quarter, up from 67.2% just five quarters ago, and 65.0% 20 years ago. During the last five quarters, services production rose 3.1% in real terms, but goods output fell 4.6%. About one-half of the \$19.6 billion worth of services output added since the third quarter of 2000 was generated by the information and cultural services and real estate services industries.

In the fourth quarter of 2001, the services industries expanded 1.0%, following four quarters of relatively mild growth. In contrast, goods output declined 1.3%. Retail trade industries, real estate services and the information and cultural services industries generated nearly two-thirds of the \$6.2 billion in additional services output in the fourth quarter.

The fourth quarter 2001 issue of Services indicators (Internet: 63-016-XIB, \$26/\$87; paper: 63-016-XPB, \$35/\$116) is now available. For more information, contact Don Little (613-951-6739; don.little@statcan.ca), Service Industries Division.

Average weekly earnings highest in accommodation and food services

Average weekly earnings for all employees increased \$2.19 in February to \$674.50. Average weekly earnings were up 2.1% from February 2001.

Average weekly earnings, all industries, February 2002 Seasonally adjusted

	\$	% change, previous month	% change, previous year
Canada	674.50	0.3	2.1
Newfoundland and Labrador	619.90	0.5	3.4
Prince Edward Island	533.46	0.1	2.8
Nova Scotia	585.09	0.4	2.9
New Brunswick	598.47	0.2	1.5
Quebec	636.88	0.3	2.6
Ontario	718.18	0.3	2.0
Manitoba	602.16	0.8	2.9
Saskatchewan	606.95	0.2	1.8
Alberta	697.92	0.4	3.0
British Columbia	670.71	0.6	0.7
Yukon	769.90	0.4	3.3
Northwest Territories ¹	882.50	1.3	3.3
Nunavut ¹	788.51	0.3	1.2

¹ Data not seasonally adjusted.

Accommodation and food services (+6.7%) had the strongest year-over-year weekly earnings growth rate of all industries, mostly due to hourly earnings gains for hourly paid employees.

Other industries reporting strong year-over-year earnings gains included arts, recreation and leisure (+4.8%) and health and social services (+4.6%). Employees in the finance and insurance industry had a slight earnings decline (-0.9%), due mostly to reduced special payments.

Average hourly earnings for hourly paid employees were \$17.04 in February, down slightly from January but up 3.3% from February 2001. Average weekly hours and average overtime hours were virtually unchanged from January.

The number of employees on payrolls rose 18,000 (+0.1%). Employment gains were led by manufacturing (+5,000), wholesale trade (+5,000) and retail trade (+4,000). Professional, scientific and technical services also rose (+3,000).

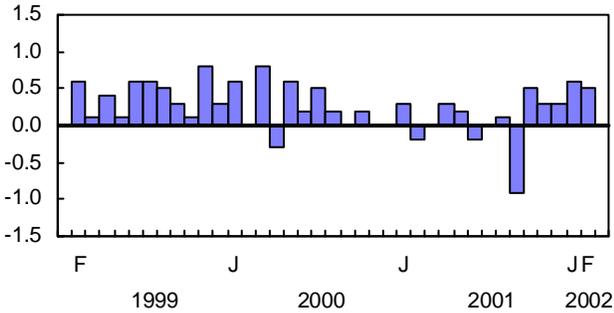
Among the provinces, Alberta and Ontario posted the strongest employment gains. Alberta had widespread gains in services-producing industries; in Ontario, manufacturing led employment growth by industry.

*Detailed data will be available in the monthly publication **Employment, earnings and hours** (Internet: 72-002-XIB, \$24/\$240). For general information, contact the Client Services Unit (1-866-873-8788; 613-951-4090; labour@statcan.ca). For analytical information, contact Robert Frindt (613-951-4069) or Jean Leduc (613-951-4061), Labour Statistics Division.*

Current trends

Gross domestic product

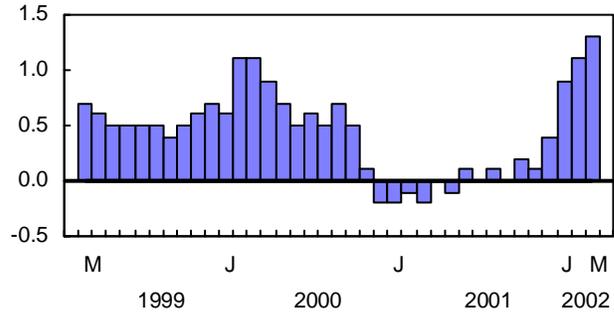
% change, previous month



Total economic activity advanced 0.5% in February, after rising 0.6% in January.

Composite index

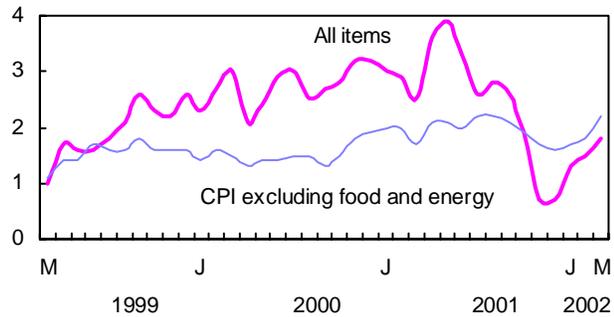
% change, previous month



The leading indicator gained 1.3% in March. Household demand remained a pillar of strength, while manufacturing continued to lag.

Consumer price index

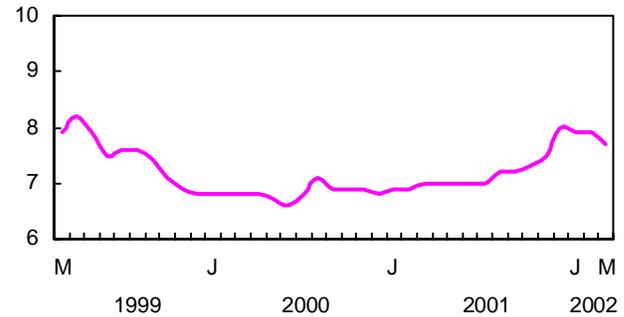
% change, previous year



Consumer prices for goods and services were 1.8% higher in March than they were a year earlier. Excluding food and energy, prices rose 2.2%.

Unemployment rate

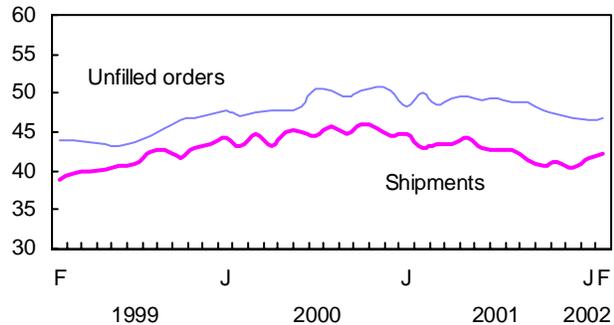
%



In March, the unemployment rate fell 0.2 percentage points to 7.7%.

Manufacturing

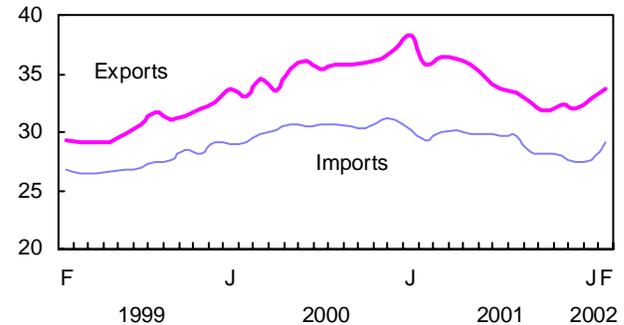
\$ billions



Manufacturers' shipments increased 0.8% in February to \$42.1 billion. The backlog of unfilled orders rose 0.5% to \$46.7 billion.

Merchandise trade

\$ billions



In February, the value of merchandise exports rose 2.7% to \$33.7 billion. Imports climbed 5.1% to \$29.1 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	February*	953.1	0.5%	1.8%
Composite Index (1992=100)	March	173.0	1.3%	4.1%
Operating profits of enterprises (\$ billions)	Q4 2001	33.8	-5.6%	-29.9%
Capacity utilization rate (%) ²	Q4 2001	80.3	-1.2†	-4.8†
DOMESTIC DEMAND				
Retail trade (\$ billions)	February	25.2	-0.1%	6.9%
New motor vehicle sales (thousands of units)	February	146.4	-0.4%	17.2%
Wholesale trade (\$ billions)	February	33.8	0.2%	5.6%
LABOUR				
Employment (millions)	March	15.3	0.6%	1.3%
Unemployment rate (%)	March	7.7	-0.2†	0.7†
Participation rate (%)	March	66.6	0.2†	0.5†
Average weekly earnings (\$)	February*	674.50	0.33%	2.12%
Help-wanted Index (1996=100)	March	126	1.6%	-25.0%
Regular Employment Insurance beneficiaries (in thousands)	February	553.5	-1.0%	12.1%
INTERNATIONAL TRADE				
Merchandise exports (\$ billions)	February	33.7	2.7%	-5.9%
Merchandise imports (\$ billions)	February	29.1	5.1%	-0.7%
Merchandise trade balance (all figures in \$ billions)	February	4.5	-0.5	-1.9
MANUFACTURING				
Shipments (\$ billions)	February	42.1	0.8%	-1.8%
New orders (\$ billions)	February	42.3	2.2%	-5.3%
Unfilled orders (\$ billions)	February	46.7	0.5%	-6.9%
Inventory/shipments ratio	February	1.47	-0.02	-0.05
PRICES				
Consumer Price Index (1992=100)	March	117.7	0.7%	1.8%
Industrial Product Price Index (1997=100)	March*	107.2	0.6%	-1.2%
Raw Materials Price Index (1997=100)	March*	111.0	5.5%	-7.0%
New Housing Price Index (1992=100)	February	108.3	0.7%	3.2%

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.

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A weekly review

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Products released from April 25 to May 1, 2002

SUBJECT AREA Title of product	Period	Catalogue number	Price (\$) (issue/subscription)
AGRICULTURE			
Cereals and oilseeds review	February 2002	22-007-XIB	11/112
Cereals and oilseeds review	February 2002	22-007-XPB	15/149
Farm Product Price Index	February 2002	21-007-XIB	free
Greenhouse, sod and nursery industries	2001	22-202-XIB	26
Stocks of frozen meat products	April 2002	23-009-XIE	free
ANALYTICAL STUDIES			
Wives, mothers and wages: Does timing matter?		11F0019MIE02186	free
BALANCE OF PAYMENTS AND FINANCIAL FLOWS			
Canada's international transactions in securities	February 2002	67-002-XIB	14/132
Canada's international transactions in securities	February 2002	67-002-XPB	18/176
DISTRIBUTIVE TRADES			
Retail trade	February 2002	63-005-XIB	16/155
INCOME AND EXPENDITURE ACCOUNTS			
National income and expenditure accounts	Q4 2001	13-001-XIB	33/109
National income and expenditure accounts	Q4 2001	13-001-XPB	44/145
Provincial and territorial tourism satellite accounts for Canada	1996	13F0063XIE	free
INDUSTRIAL ORGANIZATION AND FINANCE			
Financial performance indicators for Canadian business	2000	61F0058XCB	225
Financial performance indicators for Canadian business	2000	61F0058XME	750
MANUFACTURING, CONSTRUCTION AND ENERGY			
Asphalt roofing	March 2002	45-001-XIB	5/47
Production and disposition of tobacco products	March 2002	32-022-XIB	5/47
Supply and disposition of crude oil and natural gas	November 2001	26-006-XPB	19/186
Sawmills and planing mills	February 2002	35-003-XIB	9/86
SCIENCE, INNOVATION AND ELECTRONIC INFORMATION			
Science statistics, Vol. 26, no. 3		88-001-XIB	6/59
SERVICE INDUSTRIES			
Restaurant, caterer and tavern statistics	February 2002	63-011-XIE	6/55
Services indicators	Q4 2001	63-016-XIB	26/87
Services indicators	Q4 2001	63-016-XPB	35/116

Catalogue numbers with an -XIB or an -XIE extension are Internet versions (B signifies bilingual, E signifies English); those with -XMB or -XME are microfiche; and -XPB or -XPE denote the paper version. XDB means the electronic version on diskette, while -XCB denotes a compact disc.

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Calendar of key releases: May 2002

Monday	Tuesday	Wednesday	Thursday	Friday
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