



Infommat

A Weekly Review

Friday, May 5, 2000

OVERVIEW

◆ First GDP contraction in 19 months

Economic activity receded for the first time in 19 months in February, as gross domestic product fell 0.4%. Led by auto production, this decline followed three months of particularly strong growth.

◆ Retail sales decline

Following flat sales in January, consumers reduced their purchases in retail stores by 1.1% in February. Sales were down in all store categories except food stores.

◆ Foreigners heavily buying Canadian equities

In February, foreign investors continued to add substantially to their holdings of Canadian equities and divested an even greater amount from their holdings of debt instruments. Canadian investors, meanwhile, maintained their strong appetite for foreign shares.

◆ Earnings growth nearly matches inflation

In February, average weekly earnings were up from a year earlier by 2.8% at \$622.42. This year-over-year growth in earnings nearly matched February's annual inflation rate as shown by the Consumer Price Index (+2.7%).

◆ Farmers indicate their planting intentions

This year, western farmers intend to rotate into considerably more barley, field peas and durum wheat, and reduce their acreage of spring wheat and oilseeds. In the east, farmers expect to plant the largest-ever acreage of grain corn.

◆ Canadians spending more to eat out

During the 1990s, Canadians spent a higher proportion of their food budget on meals outside the home than they did in the 1980s. Individuals who live alone, those in higher-income households, and people without children are most likely to eat out.

First GDP contraction in 19 months

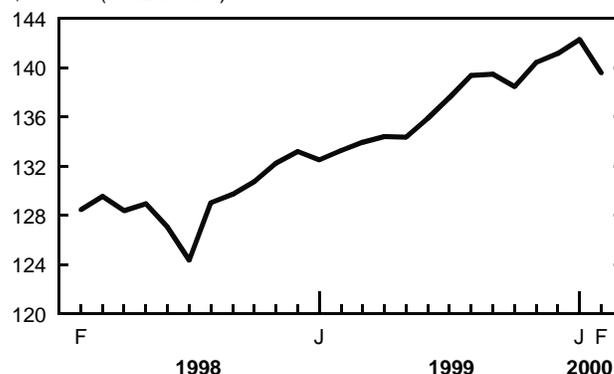
Economic activity receded for the first time in 19 months in February, as gross domestic product fell 0.4%. This decline followed three months of particularly strong growth. Moreover, the level of activity in February was still greater than that of December 1999, and 3.8% higher than in February 1999.

After three robust months, manufacturing output tumbled 1.9%—the largest monthly decline in more than a year and a half. A significant drop in automotive production led a broad decline: 17 of 22 major industry groups (accounting for 70% of total manufacturing production) retreated. The declines were partly offset by growth in the finance industries (stock market-related) and by a surge in utilities' output (cold weather). As well, mining output edged up, buoyed by higher natural gas and metal mining production. The pace of business services activity also rose (+0.7%).

Car and truck production slumped 6.5% in February, wiping away the three prior months' gains. February's slump at auto assembly plants led to drops for auto parts production (-2.7%) and auto parts imports (-7.2%). And auto exports, after surging 19.2% in January, plummeted 17.3%. Nevertheless, strong consumer demand in the United States, where more than 90% of Canadian-built automobiles are shipped, showed no sign of abating. Dealers in the United States saw auto sales soar to record levels that depleted inventories.

Manufacturing output

\$ billions (1992 dollars)



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... First GDP contraction in 19 months

After advancing in January, output of fabricated metal products dropped 4.2%. About half the decline was caused by lower output of stamped, pressed and coated metal products. The printing and publishing industry also suffered a setback (-3.3%) after a healthy gain in January. The decline affected both printing and publishing. Pulp and paper production dropped 2.3%, the second consecutive decline, leaving the sector 3.8% below its September 1999 peak. In addition, exports of pulp and paper fell 3.5% in February.

Production fell for wood products (-2.0%) and furniture (-4.2%). Sawmills' output slowed 1.4% after a 1.6% hike in January, leaving the industry 2.8% below the peak it reached last August. Residential construction and lumber exports both fell, as many producers took down time after reaching their annual production quotas. Production of most other types of wood products also slowed. The largest offsetting increase was output of machinery (+2.4%), particularly construction and other machinery.

Wholesale trade fell 1.3%, bringing the industry back to spring 1999 levels. Distribution of automotive products fell sharply, paralleling the January spikes and February drops in production and exports. Declines were also seen in lumber, building products, hardware, and furniture—all coming down from January peaks. Farm machinery sales fell to a new low in February. These declines were partly offset by increased computer and software distribution.

Note to users

Monthly gross domestic product (GDP) by industry is valued at 1992 prices. The estimates presented here are seasonally adjusted at annual rates.

Following three consecutive gains, retail sales activity fell 1.6%. Auto dealers felt the brunt of consumer reticence, as the number of cars and trucks sold fell 4.4%. Higher sales by grocery and liquor stores partly offset the decline, as they recovered from January's post-millennium slump in demand.

Construction activity, which had been gaining momentum since mid-1999, fell 0.7% in February. This followed a 1.9% increase in January. A decline in homebuilding (single dwellings) more than offset continued growth in non-residential construction. Still, residential construction activity was 7.0% higher than in February 1999.

The February 2000 issue of *Gross domestic product by industry* (online at www.statcan.ca: 15-001-XIE, \$10/\$110) presents the full report. A print-on-demand version is also available at a different price. To order, or to purchase data, contact Yolande Chantigny (1 800 877-4623; imad@statcan.ca). For further analytical information, contact Richard Evans (613-951-9145; evanric@statcan.ca), Industry Measures and Analysis Division. See also "Current trends" on page 7.

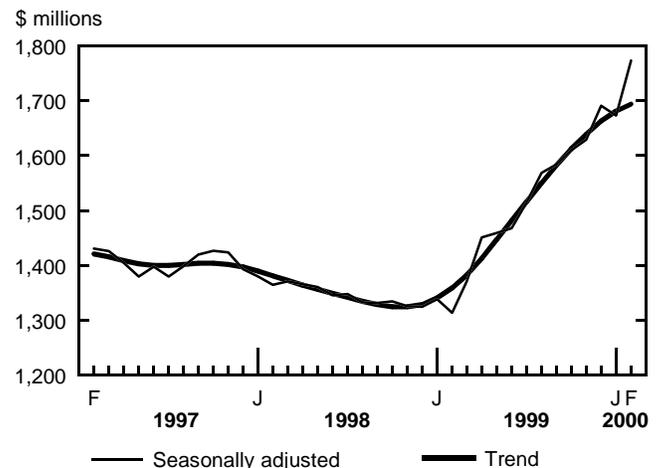
Retail sales decline

Following flat sales in January, consumers reduced their purchases in retail stores by 1.1% in February, down to \$22.3 billion. Retail sales were down in all store categories by at least 1.0%, with the exception of food stores (+1.8%). Despite the weak performances in January and February, retailers have been racking up strong sales growth since the fall of 1998. In February, sales were up from a year earlier by 4.9%.

Retail sales, February 2000
Seasonally adjusted

	\$ millions	% change, previous month	% change, previous year
Canada	22,273	-1,1	4,9
Newfoundland	359	-1,0	4,4
Prince Edward Island	102	2,9	14,2
Nova Scotia	694	3,0	4,4
New Brunswick	557	-1,5	4,0
Quebec	5,102	-2,8	1,7
Ontario	8,482	-1,3	6,0
Manitoba	774	0,7	3,8
Saskatchewan	667	0,1	6,4
Alberta	2,561	-0,5	7,7
British Columbia	2,900	0,1	5,3
Yukon	28	1,1	-1,2
Northwest Territories	32	0,3	5,2
Nunavut	15	-1,1	9,5

Sales at gasoline service stations



Consumers were back in food stores in force in February. Sales advanced at supermarkets (+1.9%) and at other food stores (+0.8%). February's gains for food stores followed two months of unusual sales. In January, consumers cut back considerably on their purchasing in food stores, following strong activity in December that was mainly caused by concern over potential Y2K problems and millennium festivities.

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... Retail sales decline

Automotive retailers led February's sales declines (-2.5%). Sales were slower at motor and recreational vehicle dealers (-5.1%), as well as at auto parts, accessories and service outlets (-1.0%). Dealers and parts and service stores also posted weak sales in January, after two months of healthy gains. Gasoline service stations (classified as automotive retailers) saw sales jump 6.0% in February. The jump was partly caused by higher gasoline prices, which rose an average 3.1% from January. In February, sales at gasoline service stations were 35.0% higher than in February 1999, the last month before gasoline prices took off.

Consumers' restrained spending in February also took a toll on general merchandise retailers (-1.5%). Within this trade group, sales were down 2.2% at department stores and 0.5% at other general merchandise stores. After two months of strong increases, sales fell 1.3% at furniture stores and at clothing stores. Stores classified as "other retail" also reported lower sales in February (-1.2%). That decline followed a 2.0% gain in January. This

category includes liquor stores, sporting goods stores, hardware stores and bookstores. Drugstore sales were down 1.1%. Sales at drugstores have flattened out since the fall of 1999.

In February, retail sales varied considerably by province. The largest declines in retailing activity occurred in Quebec, New Brunswick and Ontario. The strongest gains were in Nova Scotia and Prince Edward Island. The sales declines in Quebec and Ontario followed three consecutive monthly gains. In February, sales in these two provinces were down in all retail stores except food stores.

The February 2000 issue of *Retail trade* (print: 63-005-XPB, \$21/\$206; online at www.statcan.ca: 63-005-XIB, \$16/\$155) presents the full report for the month, as well as revised data for 1999. To order data, or for general information, contact Client Services (1 877 421-3067 or 613-951-3549, retailinfo@statcan.ca). For further analytical information, contact Paul Gratton (613-951-3541; gratpau@statcan.ca), Distributive Trades Division.

Foreigners heavily buying Canadian equities

In February, foreign investors continued to add substantially to their holdings of Canadian equities. They increased their holdings of Canadian shares by \$4.1 billion, principally through acquisitions on the secondary market. American buying of Canadian technology shares set the tone. Notably, foreign trading of Canadian shares jumped 50% in February. This followed the massive \$4.7 billion worth of foreign buying in January, which was mainly accounted for by new Canadian shares exchanged in the acquisition of an American company.

Foreigners' holdings of Canadian debt instruments declined more sharply in February than their equity holdings climbed. Foreign investors continued to sell off Canadian bonds to the tune

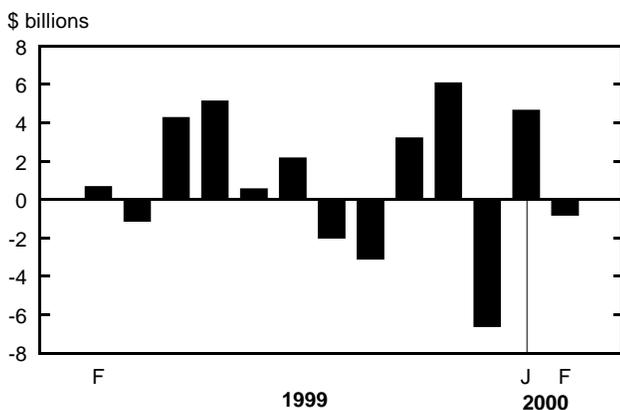
Related market information

In February, a combination of unchanged Canadian short-term interest rates and advancing American rates pushed the interest-rate differential further in favour of investing in the United States. At month-end, the differential was 80 basis points, the highest since January 1998. On long-term government instruments, the differential also favoured investment in the United States and fluctuated in a range of 10 to 30 basis points for a second month.

The TSE 300 composite index jumped 7.6% in February, marking a fifth consecutive month of higher closes and a total increase of 31% over this period. This contrasted sharply with Standard & Poor's 500 index, which dropped 2.0% in February and gained only 6.5% over the same five months.

The Canadian dollar moved marginally lower in February against the U.S. dollar for a second consecutive month, closing at 69 U.S. cents.

Foreign investment in Canadian securities¹



¹ Includes bonds, stocks and money market paper.

of \$4.4 billion. Including February's sell-off, they divested almost \$13 billion worth of bonds in the three months from December. Most of February's decline resulted from a \$2.4 billion sell-off of existing bonds (mainly federal), though retirements continued to exceed new issues floated in foreign markets. Since December 1999, retirements of foreign-held Canadian bonds have outstripped new issues placed abroad by a margin of more than 2 to 1.

As for short-term paper, foreign investors renewed the downward trend observed last year by reducing their holdings. In fact, they reversed by roughly half the \$1.1 billion investment made in January. The selling in February was concentrated in government paper, mainly federal Treasury bills, as rising American rates pushed the interest-rate differential further in favour of investment in the United States.

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... Foreigners heavily buying Canadian equities

Canadian investors, for their part, continued to be net buyers of foreign securities in February. Their interest was particularly tilted toward stock markets, where their buying totalled \$2.8 billion. However, they did shed a small amount of foreign bonds for a second month in a row. Canadian mutual funds intensified their buying in foreign stock markets in February, and continued to account for the bulk of the foreign share buying.

Year-to-date, Canadian investors have weighted their foreign stock buying toward American companies, consistent with the pattern seen last year.

*The February 2000 issue of **Canada's international transactions in securities** (print: 67-002-XPB, \$18/\$176; online at www.statcan.ca: 67-002-XIB, \$14/\$132) presents the full report. For further information, contact Don Granger (613-951-1864), Balance of Payments and Financial Flows Division.*

Earnings growth nearly matches inflation

In February, average weekly earnings for all employees were \$622.42, up \$2.53 (+0.4%) from the previous month. Between February 1999 and February 2000, average weekly earnings increased by \$17.04, a rise of 2.8%. This year-over-year growth in earnings nearly matched February's annual inflation rate as shown by the Consumer Price Index (+2.7%).

In 1999, the year-over-year growth in average weekly earnings was strongest in September (+1.4%) and December (+1.3%). In the first two months of this year, average weekly earnings grew at an estimated rate of 2.2% in January and 2.8% in February. Increases in both hours and wage rates contributed to the earnings growth.

For hourly-rated employees, average weekly hours increased by 0.1 hours in February to 31.8 hours per week. Average overtime hours were unchanged. Their average hourly earnings, which rose 15 cents in February to \$15.70, were up from a year earlier by 2.6%.

Payroll employment swelled in February for a sixth month in a row, as employers added 16,000 additional employees to payrolls. The gains were significant in construction and wholesale trade. By province, the strongest additions to payrolls in February occurred in Ontario and Alberta.

Average weekly earnings by industry, February 2000 Seasonally adjusted

	\$	% change, previous month	% change, previous year
All industries	622.42	0.4	2.8
Logging and forestry	822.36	1.4	10.7
Mining, quarrying and oil wells	1,133.10	0.3	3.7
Manufacturing	774.62	0.4	4.3
Construction	723.28	0.4	3.6
Transportation and storage	749.65	0.1	1.2
Communications and other utilities	816.51	0.1	1.6
Wholesale trade	654.40	-1.1	-0.5
Retail trade	373.89	-0.8	0.2
Finance and insurance	832.90	1.9	5.6
Real estate and insurance agencies	638.52	0.6	-1.2
Business services	721.77	1.5	4.3
Education-related services	669.81	0.0	1.7
Health and social services	532.47	0.3	2.1
Accommodation, food and beverage	244.23	0.9	2.5
Public administration	752.23	0.3	2.9
Miscellaneous services	418.26	0.4	1.8

*The February 2000 issue of **Employment, earnings and hours** (72-002-XPB, \$32/\$320) presents the month's industry data and other labour market indicators in detail. Custom tabulations of the data are available on demand. Annual averages for 1999 are also available in a few formats. For further information, contact Jean Leduc (613-951-4090; fax: 613-951-4087; labour@statcan.ca), Labour Division.*

Farmers indicate their planting intentions

Western farmers report that they intend to rotate their field crop areas into considerably more barley, field peas and durum wheat this year, and reduce their acreage of spring wheat and oilseeds. In the east, farmers indicate that they will plant the largest-ever area devoted to grain corn.

Planted acreage of barley is expected to be 13.3 million acres—the highest in 19 years. In 1981, farmers planted 13.7 million acres in barley. The recent 10-year average seeded area is 11.4 million acres. All three Prairie provinces are moving in concert to increase barley acreage: Manitoba (+37%), Saskatchewan (+28%) and Alberta (+18%). The growing livestock industry in the west is the major user of barley.

Note to users

The last week of March, 12,000 farm operators were interviewed about their seeding intentions for field crops in the coming 2000/01 crop year. These intentions might differ from what is actually seeded later in the year. Changes in market outlook, expected prices, spring weather conditions and the published seeding intentions themselves may alter these intentions.

Field peas will set a new record for seeded area this year at 3.0 million acres. That marks a 43% increase from 1999. The previous record of 2.7 million acres was set in 1998. As with barley, the growth will occur in all three Prairie provinces:

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... Farmers indicate their planting intentions

Manitoba (+71%), Saskatchewan (+45%), and Alberta (+38%). Peas are being used increasingly in domestic animal rations, and are exported to Europe and Asia as well.

Durum wheat plantings are expected to increase by more than one-third from last year. Western farmers expect to plant 6.1 million acres, up from 4.4 million acres in 1999. The average for the past five years is 5.5 million acres, and the record of 7.3 million acres was set in 1998. The increase could be in response to a drought in the durum-growing regions around the Mediterranean Sea, lower planting intentions in the United States and better price prospects for durum wheat.

Quebec and Ontario corn producers report that they intend to seed 3.0 million acres of grain corn—300,000 acres more than the 1999 record 2.7 million planted in 1999. Together, they plant 93% of the grain corn in Canada. This will be the single largest acreage of grain corn in history for the two provinces. The five-year average for Quebec and Ontario is 2.6 million acres. The increases over the last three years reflect the expanding hog industry in the two largest hog-producing provinces and the growing ethanol fuel industry.

Seeding intentions of major grains and oilseeds

	1999	2000	1999 to 2000
	millions of acres		% change
Wheat, total	25.8	25.8	0
Spring wheat	20.5	18.7	-9
Durum wheat	4.4	6.1	39
Barley	10.9	13.3	22
Canola	13.8	11.4	-17
Oats	4.7	4.7	0
Corn for grain	2.9	3.3	14
Soybeans	2.5	2.5	0
Field peas	2.1	3.0	43
Flaxseed	2.0	1.3	-35

Field crop reporting series, vol. 79, no. 2: March intentions of principal field crops areas, Canada, 2000 (print: 22-002-XPB, \$15/\$88; online at www.statcan.ca: 22-002-XIB, \$11/\$66) is now available. For further information, contact David Burroughs (613-951-5138; dave.burroughs@statcan.ca) or David Roeske (613-951-0572; david.roeske@statcan.ca), Agriculture Division.

Canadians spending more to eat out

During the 1990s, Canadians spent a higher proportion of their food budget on meals outside the home than they did in the 1980s. For every \$100 spent on food in 1998, an average of \$34.60 went to meals outside the home, mostly in restaurants. That marked an increase from \$32.70 in 1989.

This increase might have been due to several factors: economic expansion and improved consumer confidence in the mid- to late 1990s; greater time constraints for consumers; more single-person households; and rapid growth in the number of food service establishments.

Food services, 1996

	Proportion of Canada's population	Proportion of consumer market for restaurants
	%	
Canada	100.0	100.0
Newfoundland	1.9	0.9
Prince Edward Island	0.5	0.4
Nova Scotia	3.1	2.7
New Brunswick	2.5	1.9
Quebec	24.7	26.5
Ontario	38.0	34.6
Manitoba	3.7	3.5
Saskatchewan	3.3	3.1
Alberta	9.3	9.6
British Columbia	12.9	16.9

Note to readers

The term food services refers to licensed and unlicensed restaurants, take-outs, caterers and taverns. Food stores include supermarkets and grocery stores, but exclude specialty food stores, warehouse club stores, mass merchandisers and drugstores. In 1998, Canadians spent a total of \$77.6 billion on food. Of that amount, \$50.7 billion went to purchasing food and non-alcoholic beverages in food stores and \$26.9 billion was spent on meals outside the home.

From 1989 to 1998, personal spending on meals purchased outside the home climbed 42.2%, even as the amount spent on food and non-alcoholic beverages from supermarkets, grocery stores and other food stores surged 30.3%. This shift in consumer preferences was already well under way in previous decades. From 1961 to 1989, consumer spending at food stores increased eight-fold, while outlays for meals outside the home vaulted almost 19-fold.

Individuals who live alone, those in higher-income households, and people without children are most likely to eat out. People living in urban areas spend more per person in restaurants than those who live in rural regions. As well, there are significant differences from province to province. For example, Atlantic Canadians spend relatively less on eating out than people in other regions, whereas British Columbians and, to a lesser extent, Quebeckers and Albertans spend relatively more on eating out.

Intense competition among food stores and food service providers in the 1990s compelled both industries to contain costs, particularly for labour, in order to limit price increases for consumers. For example, even though the food service industry's average pay increased from 1989 to 1998, rising from \$179.90 a

(continued on page 6)

... Canadians spending more to eat out

week to \$214.67, this represented a 2.2% drop after accounting for inflation. This drop may have been due to the industry's greater reliance on part-time workers. Similarly, competitive pressures also prompted food stores to rely more on part-time workers and reduce average remuneration in real terms.

Technological developments have led to relatively lower inventory costs and improved labour productivity for both industries. In food services, for example, the inventory-sales ratio declined from 1989 to 1998, while receipts per employee hour worked rose 11% in real terms.

Food service providers and food stores have also sought additional market share by adjusting to changing consumer

preferences. Notably, more fast-food, delivery, take-out and drive-through food service outlets exist for time-constrained customers. For their part, food stores have responded to consumer time constraints by expanding store hours and by offering more and more pre-prepared meals and home meal replacements.

*This article is derived from a special report titled "Food services competition in the 1990s". It appears in the fourth quarter 1999 issue of **Services indicators** (print: 63-016-XPB, \$35/\$116; online at www.statcan.ca: 63-016-XIB, \$26/\$87), which is now on sale. For further information, contact Don Little (613-951-6739; littdon@statcan.ca), Services Industries Division.*

New from Statistics Canada

Health care in Canada 2000: A first annual report

Statistics Canada and the Canadian Institute for Health Information have jointly released *Health care in Canada 2000: A first annual report*, which examines Canada's health care system. Topics include the changing health care system, the cost of health care, the health care team, primary health care, hospitals and health care beyond the hospital.

*The new report, **Health care in Canada 2000: A first annual report** is available at www.cihi.ca. A companion report, **How healthy are Canadians?**, examines health status and factors that influence population health. It is available in the recently released vol. 11, no. 3 issue of **Health reports** (print: 82-003-XPB, \$35/\$116; online at www.statcan.ca: 82-003-XIE, \$26/\$87). For further information, contact Karen McCarthy (613-241-7860; kmccarthy@cihi.ca), Canadian Institute for Health Information or Michel Séguin (613-951-4262; michel.seguin@statcan.ca), Health Statistics Division, Statistics Canada.*

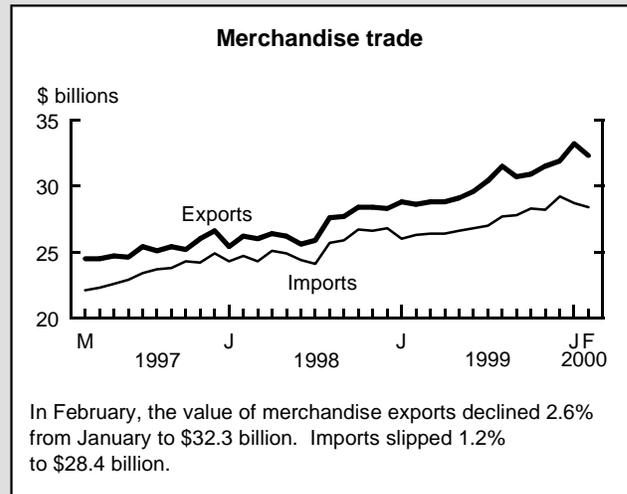
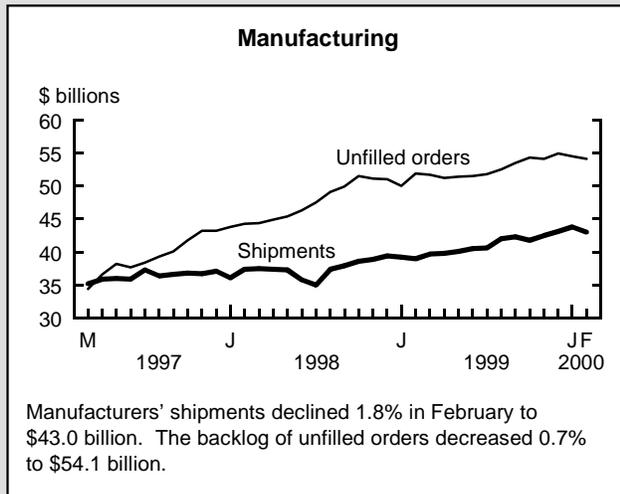
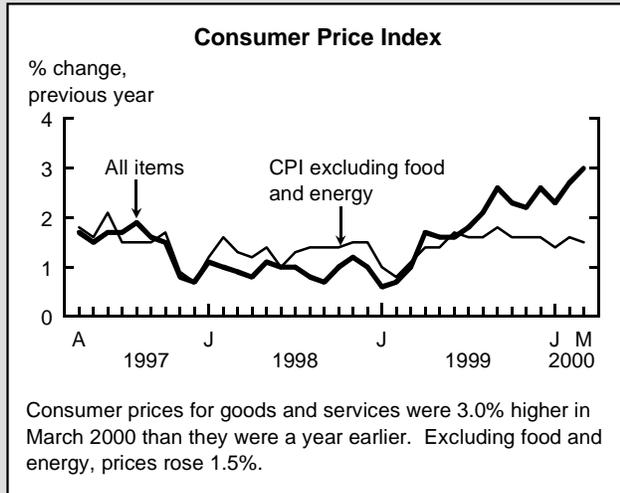
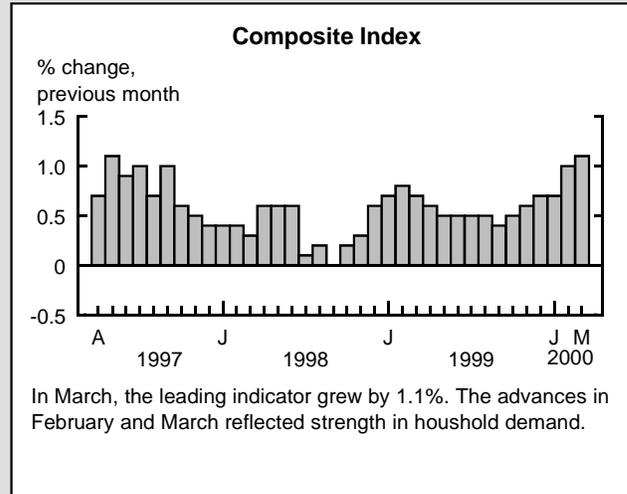
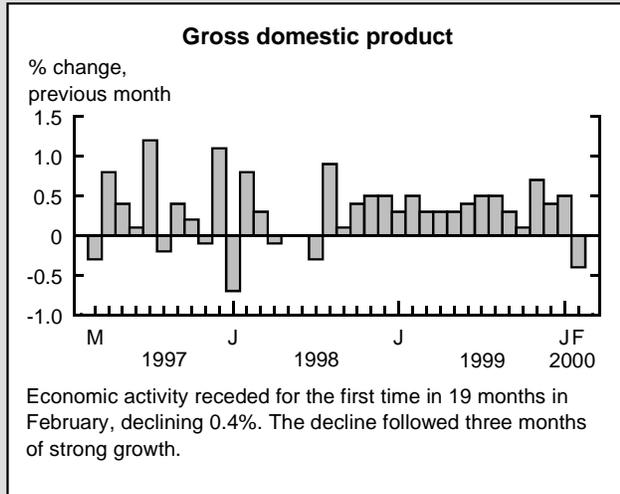
Greenhouse, sod and nursery industries

1999

The greenhouse industry grew in both size and sales in the 1990s. Between 1990 and 1999, the total area under glass and plastic grew by 129% to 3,631 acres, or 158 million square feet. Total greenhouse sales increased to \$1.45 billion in 1999, up from \$1.30 billion in 1998. Thirty percent of revenues were derived from greenhouse vegetable production. These are just a few of the details about the greenhouse industry that are provided in this new report.

*The 1999 issue of **Greenhouse, sod and nursery industries** (online at www.statcan.ca: 22-202-XIB, \$26) is now available. A print-on-demand version is also available for \$47. For further information, contact Bill Parsons (613-951-8727), Agriculture Division.*

Current trends



Note: All series are seasonally adjusted except the Consumer Price Index.

Latest statistics

	Period	Level	Change, previous period	Change, previous year
GENERAL				
Gross domestic product (\$ billion, 1992)	February*	766.8	-0.4%	3.8%
Composite Index (1992=100)	March	160.1	1.1%	7.9%
Operating profits of enterprises (\$ billion)	Q4 1999	43.9	7.8%	27.1%
Capacity utilization (%)	Q4 1999	86.8	1.3†	4.0†
DOMESTIC DEMAND				
Retail trade (\$ billion)	February	22.3	-1.1%	4.9%
Department store sales (\$ billions)	February	1.49	-2.5%	1.5%
New motor vehicle sales (thousand of units)	February	126.6	-4.4%	6.5%
Wholesale trade (\$ billion)	February	30.9	-1.1%	7.4%
LABOUR				
Employment (millions)	March	14.86	0.2%	3.2%
Unemployment rate (%)	March	6.8	0.0†	-1.1†
Participation rate (%)	March	65.9	0.1†	0.4†
Average weekly earnings (\$)	February*	622.42	0.4%	2.8%
Help-wanted Index (1996=100)	March	171	0.6%	11.8%
INTERNATIONAL TRADE				
Merchandise exports (\$ billion)	February	32.3	-2.6%	12.9%
Merchandise imports (\$ billion)	February	28.4	-1.2%	7.7%
Merchandise trade balance (all figures in \$ billion)	February	4.0	-0.5	1.7
MANUFACTURING				
Shipments (\$ billion)	February	43.0	-1.8%	10.3%
New orders (\$ billion)	February	42.6	-1.7%	4.2%
Unfilled orders (\$ billion)	February	54.1	-0.7%	4.2%
Inventory/shipments ratio	February	1.31	0.04	0.00
PRICES				
Consumer Price Index (1992=100)	March	112.8	0.7%	3.0%
Industrial Product Price Index (1992=100)	March*	126.6	0.6%	5.5%
Raw Materials Price Index (1992=100)	March*	142.7	2.0%	33.1%
New Housing Price Index (1992=100)	February	102.4	0.4%	2.1%

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

* new this week

† percentage point

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Publications released from April 27 to May 3, 2000

Division/Title of publication	Period	Catalogue number	Price (\$) (issue/subscription)
AGRICULTURE			
Greenhouse, sod and nursery industries	1999	22-202-XIB	26
BALANCE OF PAYMENTS AND FINANCIAL FLOWS			
Canada's international transactions in securities	February 2000	67-002-XIB	14/132
INDUSTRIAL ORGANIZATION AND FINANCE			
Corporations Returns Act: Foreign control in the Canadian economy	1997	61-220-XPB	40
INTERNATIONAL TRADE			
Canadian international merchandise trade	February 2000		
Internet		65-001-XIB	14/141
Paper		65-001-XPB	19/188
MANUFACTURING, CONSTRUCTION AND ENERGY			
Electric power statistics	February 2000	57-001-XIB	9/85
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