



Infommat

A Weekly Review

Friday, May 30, 2003

INSIDE

◆ Another small gain for the leading indicators

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◆ Drought weakens net farm income

Net cash income — the difference between a farmer's cash receipts and operating expenses — tumbled 10.6% to \$7.7 billion in 2002 after reaching a record high in 2001. Cash receipts fell for the first time since 1998 in the wake of back-to-back droughts, while higher feed grain costs drove up operating expenses.

◆ Access to non-wage benefits is uneven

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◆ Social support lessens mortality among senior men

The social support that seniors get through marriage is associated with a lower risk of dying, according to a new study of mortality — but only for men. The same appears to be the case for the support an individual receives by participating in groups such as community or volunteer organizations, but again, only senior men feel the benefit.

Inflation slows significantly as gasoline prices drop

The 12-month increase in the Consumer Price Index (CPI) slowed to 3.0% in April, a significant reduction from 4.3% in March. The main cause of this slowdown was a drop in gasoline prices from March to April. The 12-month change in the CPI excluding energy also fell, from a 3.2% rise in March to a 2.7% increase in April.

After posting 12-month increases above 15% for three consecutive months, April's energy prices were only 6.2% higher than in April 2002. Gasoline prices were only 4.1% above April 2002 levels, compared with a 22.1% rise from March 2002 to March 2003.

Other factors helped to slow the 12-month increase in the CPI. Refunds received by Ontario consumers pulled electricity prices down 11.0% from April 2002. Without the electricity refunds, the 12-month increase in the CPI would have been 3.2% rather than 3.0%. Fuel oil prices also weakened the rise in the CPI. They increased 62.1% in March from March 2002, but in April, they were only 25.2% higher than in April 2002.

(continued on page 2)

Consumer Price Index, April 2003

% change, previous year, not seasonally adjusted

	All items	Food	Shelter	Transportation	Energy
Canada	3.0	1.2	3.3	6.0	6.2
Newfoundland and Labrador	3.5	-0.5	4.4	10.6	8.6
Prince Edward Island	5.4	1.0	8.1	11.3	28.0
Nova Scotia	4.2	1.7	5.3	6.9	9.8
New Brunswick	4.6	2.1	3.5	8.6	6.8
Quebec	3.0	0.8	3.5	5.6	4.0
Ontario	2.3	1.8	1.3	5.8	-0.2
Manitoba	2.4	1.2	2.7	2.4	6.7
Saskatchewan	2.1	2.5	2.1	2.9	2.0
Alberta	5.9	0.7	13.0	10.5	35.3
British Columbia	2.3	1.0	2.0	4.2	8.3
Whitehorse	3.1	0.4	2.0	7.2	7.9
Yellowknife	3.6	1.4	2.9	5.1	14.4



Inflation slows... *(continued from page 1)*

The largest mitigating impact on these slowdowns came from higher natural gas prices. The price of natural gas increased 23.5% in March from March 2002; in April, it was 49.6% higher than a year earlier.

The core inflation rate, which excludes the eight most volatile components and is closely watched by the Bank of Canada, was 2.1% in April, a significant slowdown from the 12-month rates in February (+3.1%) and March (+2.9%). Excluding the effect of the electricity refunds in Ontario, the 12-month core inflation rate would have been 2.4% in April.

On a monthly basis, the all-items CPI fell 0.7% in April, after an increase of 0.4% in March. This was the most significant reduction since the 0.9% decrease in November 2001. The downward pressure came mainly from the drop in gasoline prices. Lower electricity prices in Ontario were the second major factor; women's clothing also played a role. The decline in the CPI was slowed by the rise in the price of natural gas. Excluding energy, the CPI remained stable from March to April.

From March to April, energy prices fell 8.1%. Other than the price of natural gas, which increased 5.6%, the prices of all energy components declined. Gasoline prices decreased 9.0%, electricity prices were down 10.1% and fuel oil prices dropped 18.0%. Crude oil prices fell significantly in April, accounting for a large part of the price declines for gasoline and fuel oil.

The 10.1% drop in electricity prices was entirely attributable to a 31.7% drop in Ontario. Recent Ontario legislation set the price of electricity at 4.3 cents per kilowatt-hour starting on December 1, 2002 and provided for refunds for payments over that amount after May 1, 2002. A first payment of \$75 was mailed in December and most of the electricity companies credited their customers for the balance of the refund on their April 2003 bills.

The 18.0% drop in the price of fuel oil from March to April was the largest monthly drop since the fuel oil index was introduced in 1949. As was the case with gasoline, this drop was due to lower crude oil prices. The price reductions occurred in each province.

In the past nine years, the price of natural gas has fallen in April. This year, however, it increased 5.6%. The biggest increases were felt in British Columbia and Ontario. A higher commodity price explained the rise in British Columbia. In Ontario, the increase was attributed to a higher gas delivery charge and a temporary surcharge.

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

Another small gain for the leading indicators

The composite leading index rose 0.1% in April after a 0.2% gain in March, continuing the string of small gains that began in the summer of 2002. Household demand continued to grow enough to offset weakness in manufacturing, where export demand has slowed. Overall, four components posted gains in April, the same as in March. Four components fell, while two were unchanged.

Housing fell again in April after turning down in March, as housing starts retreated from their impressive high set in February. In April, they were situated at about their average level of 2002, which was the best in 13 years. At the same time, growth in services employment decelerated sharply from 0.5% in March to 0.1% in April, as the accommodation and food industry was hard-hit by the SARS crisis, especially in Ontario. Conversely, sales of durable goods snapped out of a nine-month slump, led by autos.

Two of the three manufacturing components fell. New orders for durable goods trended down for a sixth straight month (-0.8%), while the ratio of shipments to stocks returned to its negative trend with a 0.6% decline after a brief one-month upturn. Manufacturers cut their labour requirements again by trimming payrolls, as the average workweek has been stable for nearly a year.

The US leading indicator levelled off in April after three straight gains. The components related to household demand fell further, as real disposable income posted its first back-to-back losses in February and March since the September 2001 attacks.

*For more information on the economy, the April 2003 issue of **Canadian economic observer** (Internet: 11-010-XIB, \$17/\$170; 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 6.)*

Drought weakens net farm income

Net cash income — the difference between a farmer's cash receipts and operating expenses — tumbled 10.6% to \$7.7 billion in 2002 after reaching a record high in 2001. Cash receipts fell for the first time since 1998 in the wake of back-to-back droughts, while higher feed grain costs drove up operating expenses.

Livestock receipts fell 4.6% to \$18.0 billion, the first decline since 1998, as prices for major commodities slumped after peaking in 2001. Program payments decreased for the first time since 1997, falling 9.1% to \$3.4 billion. In contrast, total crop receipts were up 4.8% to \$14.4 billion, as higher prices across the country more than offset lower deliveries for the major grains and oilseeds.

Overall, for 2002, total farm cash receipts of \$35.8 billion were still 12.0% higher than the previous five-year average.

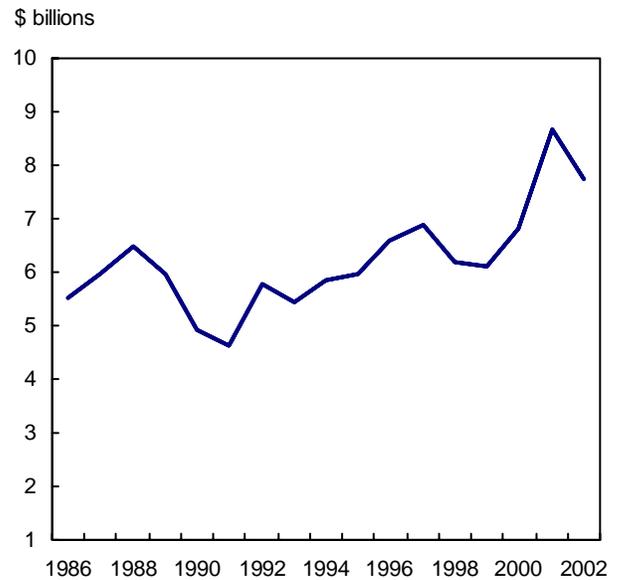
Despite the decline in 2002, cash receipts from livestock were still 12.3% above the previous five-year average. Abundant supplies of red meat on the North American market and higher feed grain costs put pressure on cattle and hog prices. This followed several years of substantial growth in cattle and hog production.

Even though total crop receipts were up in Canada, Alberta and Saskatchewan crop producers were hit hard as their crop receipts tumbled.

Farm stocks of major grains and oilseeds dwindled to extremely low levels by the end of 2001, primarily as a result of the drought that summer. This led to reduced deliveries in the first part of 2002. As drought hit large parts of Saskatchewan and Alberta for a second consecutive year in 2002, deliveries for major grains and oilseeds continued to decline. Prices averaged much higher in 2002, but failed to offset a drop in marketings.

The 9.1% decline in program payments occurred despite record crop insurance payments resulting from poor growing conditions and an increased acreage insured. Total payments, however, remained 53.9% above the previous five-year average. Most of the decline occurred because of the expiry of one-time emergency assistance payments implemented in 2001.

Net cash income of farmers



The overall 1.3% increase in operating expenses last year was the smallest since 1990. Farmers in every province reported increases, except in drought-stricken Alberta, where expenses fell 5.4%.

Tight supplies of grains put upward pressure on prices and boosted the cost of commercial feed by 15.1% to \$4.8 billion. Also contributing to the increase in total operating expenses were wages (+3.1%), machinery repairs (+3.2%) and commercial seed (+6.5%).

Total net income, which adjusts net cash income for changes in farmer-owned inventories of crops and livestock, depreciation and income-in-kind, plunged to \$2.0 billion in 2002 — the lowest level since 1983. Hardest hit were producers in Saskatchewan and Alberta, who accounted for almost the entire decline.

For more information, contact Gail-Ann Breese (204-983-3445; gail-ann.breese@statcan.ca) or Bernie Rosien (613-951-2441; bernie.rosien@statcan.ca), Agriculture Division.

Canada e-book

The *Canada year book*, one of the nation's top sources of information on social trends and the economy, is going online for the first time in its 136-year history.

The electronic version is packed with information on the country under four thematic sections: the Land, the People, the Economy and the State. It contains all 15 chapters of the print version, featuring 56 informative stories and essays, illustrated by photographs, charts and tables.

The *Canada e-book* has also been designed to take advantage of the electronic features of the Internet. It will provide links to various Statistics Canada modules, such as *Canadian statistics*, as well as links to various publications. Information in the *Canada e-book* will be updated periodically.

The *Canada e-book* (11-404-XIE, free) is now available on Statistics Canada's website (www.statcan.ca). For more information, contact Jacques Lefebvre (613-951-7220), Communications Division.

Access to non-wage benefits is uneven

Access to non-wage benefits is uneven — high wage earners are six times more likely to receive them than low earners. High levels of education and work experience are also important factors, according to a new report. The cost of non-wage benefits has increased steadily in the past half-century, and now accounts for more than one-third of total labour costs.

However, while benefits are more and more commonplace, not all employees have access to them. According to the Survey of Labour and Income Dynamics, 46% of the nation's 13.7 million employees in 2000 belonged to a registered pension plan. Only 2% reported having an employer-sponsored group RRSP to which the employer contributed.

About half of all employees had all three types of employer-sponsored insurance: extended medical, dental, and life/disability. One in three had access to at least one type of personal or family support program.

Jobs that are high-wage, unionized, full-time, permanent or in large firms were more likely to offer all types of non-wage benefits to employees. Workers with higher education levels and more work experience were more likely to be in these high-wage, high-benefit jobs.

Conversely, certain groups of employees were doubly disadvantaged with less access to non-wage benefits and lower hourly wages. These groups include employees with less than high school education, and those in part-time, temporary or non-unionized jobs.

The median hourly wage in public administration was \$20.20. About 69% of the employees in this sector had insurance coverage,

and 82% were covered by a registered pension plan. In contrast, the one million workers in the food and accommodation services industry had median hourly earnings of \$7.60. Only 13% of these employees had insurance coverage, and just 10% had pension coverage.

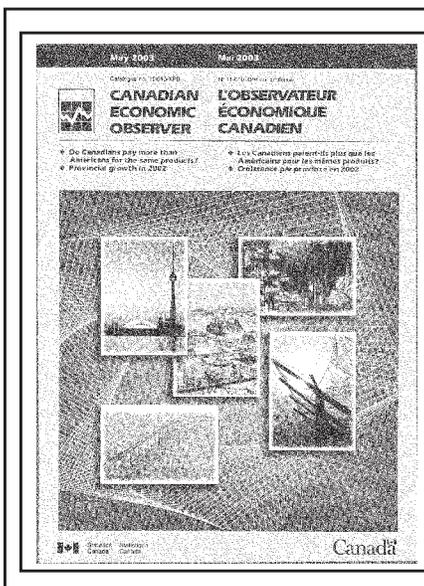
Other industries with insurance and pension plan coverage rates at least 10 percentage points below the average were wholesale and retail trade, construction, and primary industries such as fishing, forestry, agriculture and mining.

A second report analysed coverage rates among self-employed people aged 15 to 69 with respect to extended health, dental and disability insurance plans. It found that in 2000, 41% of the nearly 2.1 million self-employed Canadians had no coverage in any of the three health-related insurance plans. Most cited cost as the main reason for non-coverage. Only about 17% — mostly well-educated and with high employment income (\$60,000 or more) — had coverage in all three plans.

A large proportion of self-employed workers acquire coverage in health and dental plans by piggybacking onto the employer-sponsored plan of a spouse or close relative. For those not so lucky, the expensive approach of direct purchase appears to be the most feasible option.

Almost 7 in 10 self-employed workers in the accommodation and food service industry had no coverage, likely because they could not afford it.

The two reports "Benefits of the job" and "Health-related insurance for the self-employed" appear in the May 2003 online edition of Perspectives on labour and income, (75-001-XIE, \$5/\$48), which is now available. For more information, contact Katherine Marshall (613-951-6890; katherine.marshall@statcan.ca) Labour and Household Surveys Analysis Division.



Canadian economic observer

The May issue of Statistics Canada's flagship publication for economic statistics, *Canadian economic observer*, analyses current economic conditions, summarizes the major economic events that occurred in April and presents two feature articles. The first article looks at whether Canadians pay more than Americans for the same products, while the second examines provincial economic growth in 2002.

A separate statistical summary contains a wide range of tables and graphs on the principal economic indicators for Canada, the provinces and the major industrial nations.

The May 2003 issue of Canadian economic observer (Internet: 11-010-XIB, \$17/\$170; paper: 11-010-XPB, \$23/\$227) is now available. For more information, contact Francine Roy (613-951-3627), Current Economic Analysis Group.

Social support lessens mortality among senior men

The social support that seniors get through marriage is associated with a lower risk of dying, according to a new study of mortality — but only for men.

The same appears to be the case for the support an individual receives by participating in groups such as community or volunteer organizations, but again, only senior men feel the benefit. The study also found that the higher the level of education a senior man had, the longer he lived; this did not apply to senior women.

The study examined mortality among a group of men and women aged 65 or older over a six-year period, from 1994/95 to 2000/01, using longitudinal data from the National Population Health Survey. It is one of few such studies that examine data for men and women separately.

The analysis tested the hypothesis that social support influences the risk of dying among seniors who live in private households. Data for each sex were analysed separately because of differences between men and women in their social relationships.

The study focussed on several aspects, or markers, of social support — specifically, marital status, participation in groups or organizations, contacts with family and friends, and perceived emotional support.

The differences between men and women were assessed while taking account of other factors that might also affect mortality, including age, socio-economic status, stress, health-related behaviour such as smoking and levels of leisure-time physical activity, and health status (measured in terms of chronic conditions and dependency).

Even though the average age of elderly respondents in 1994/95 did not differ by sex, women survived an average of about three months longer than men did in the follow-up period. At the end of the period, 79% of women, compared with 68% of men, were still alive.

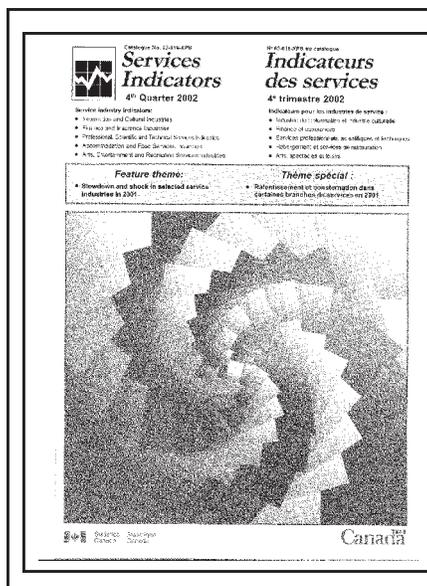
Being married had a “protective” impact on mortality among men, but not among women. Married men had a 40% lower risk of death, compared with men who were single, widowed, divorced or separated.

In addition, among men, even when a range of other variables was taken into account, participation in organizations was linked with longevity. Men who engaged in such activities had a 10% lower risk of death, compared with those who did not. In contrast, there was no association between participation in these activities and longer life among women when other factors were considered.

The likelihood of dying was significantly higher among people who had not finished high school and among those who lived in lower income households, compared with more highly educated and more affluent individuals.

When other potential influences were also taken into account, the relationship between low educational attainment and the risk of dying persisted among senior men, but not among senior women.

*The full report, “Social support and mortality in seniors”, appears in **Health reports**, Vol. 14, no. 3 (Internet: 82-003-XIE, \$15/\$44; paper: 82-003-XPE, \$20/\$58), which is now available. For more information about this article, contact Kathryn Wilkins (613-951-1769), Health Statistics Division.*



Services indicators

The fourth quarter 2002 issue of *Services indicators* analyses the impact of the economic slowdown in 2001 and the events of September 11 on three industries: traveller accommodation, travel agents, and food services and drinking places.

An additional article examines the impact of the slowdown on software development and computer services.

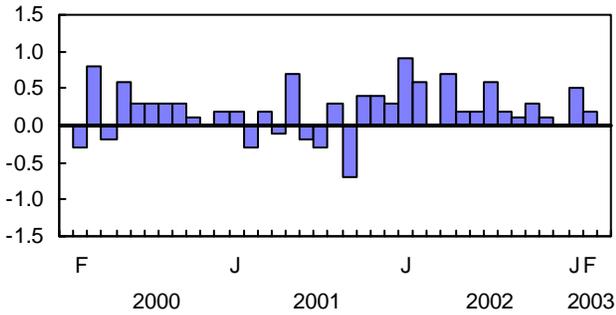
This issue also contains the regular quarterly analysis of economic developments in the services industries. According to annualized data, real economic output for services industries increased 0.6% in the fourth quarter of 2002, compared with the third quarter. This was three times the rate of growth in the goods industries.

*The fourth quarter 2002 issue of **Services indicators** (Internet: 63-016-XIB, \$26/\$87; paper: 63-016-XPB, \$35/\$116) is now available. For more information, contact Richard Vincent (613-951-5097; vincric@statcan.ca), Service Industries Division.*

Current trends

Gross domestic product

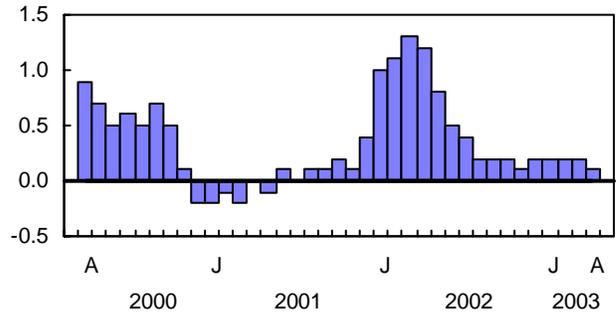
% change, previous month



Total economic activity rose 0.2% in February, after a gain of 0.5% in January.

Composite Index

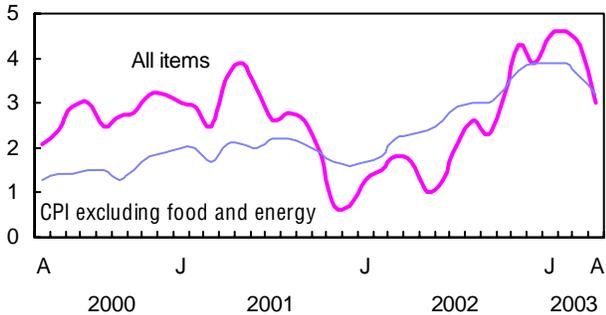
% change, previous month



The leading indicator grew 0.1% in April after rising 0.2% in March.

Consumer Price Index

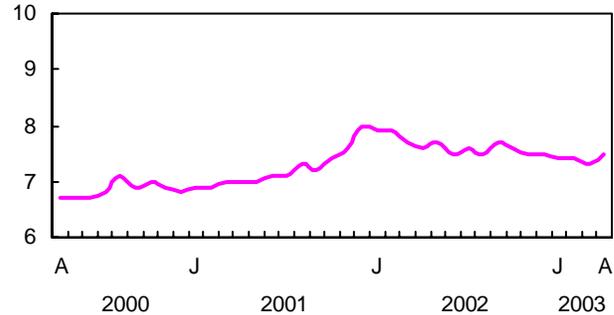
% change, previous year



Consumer prices for goods and services were 3.0% higher in April than they were a year earlier. Excluding food and energy, prices rose 3.2%.

Unemployment rate

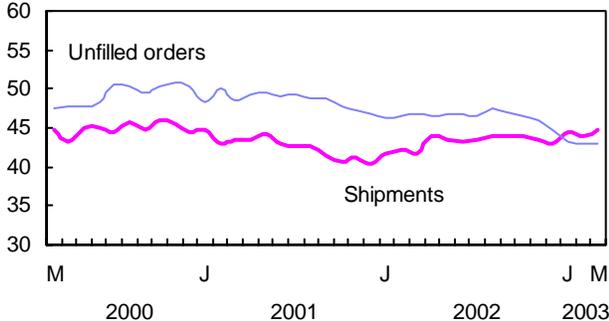
%



In April, the unemployment rate rose 0.2 percentage points to 7.5%.

Manufacturing

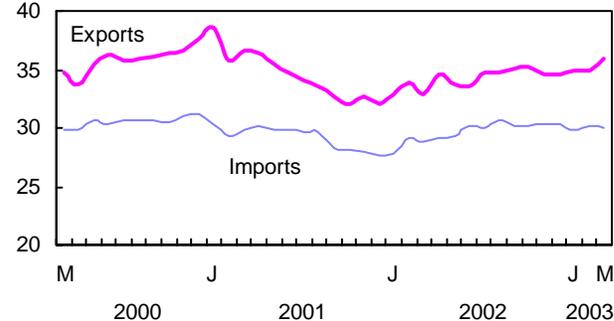
\$ billions



Manufacturers' shipments rose 1.4% in March to \$44.7 billion. The backlog of unfilled orders declined 0.4% to \$42.9 billion.

Merchandise trade

\$ billions



In March, the value of merchandise exports rose 2.8% to \$35.9 billion. Imports fell 0.5% to \$30.0 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	996.7	0.2%	3.3%
Composite Index (1992=100)	April	181.1	0.1%	3.4%
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)	March	26.4	-0.7%	4.7%
New motor vehicle sales (thousands of units)	March	139.7	-4.4%	0.1%
Wholesale trade (\$ billions)	March	36.6	-0.5%	8.0%
LABOUR				
Employment (millions)	April	15.7	-0.1%	2.6%
Unemployment rate (%)	April	7.5	0.2†	-0.1†
Participation rate (%)	April	67.4	-0.1†	0.8†
Average weekly earnings (\$)	March*	685.78	-0.03%	1.32%
Help-wanted Index (1996=100)	April	110.8	-0.1%	-13.0%
Regular Employment Insurance beneficiaries (in thousands)	March*	535.2	0.7%	-2.8%
INTERNATIONAL TRADE				
Merchandise exports (\$ billions)	March	35.9	2.8%	9.0%
Merchandise imports (\$ billions)	March	30.0	-0.5%	4.1%
Merchandise trade balance (all figures in \$ billions)	March	5.9	1.1	1.8
MANUFACTURING				
Shipments (\$ billions)	March	44.7	1.4%	6.9%
New orders (\$ billions)	March	44.5	1.6%	5.7%
Unfilled orders (\$ billions)	March	42.9	-0.4%	-8.7%
Inventory/shipments ratio	March	1.43	-0.01	-0.05
PRICES				
Consumer Price Index (1992=100)	April	121.9	-0.7%	3.0%
Industrial Product Price Index (1997=100)	April*	107.6	-1.4%	-0.1%
Raw Materials Price Index (1997=100)	April*	116.2	-6.5%	3.4%
New Housing Price Index (1992=100)	March	113.9	0.1%	4.8%

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 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)
AGRICULTURE			
Cereals and oilseeds review	March 2003	22-007-XIB	11/112
Cereals and oilseeds review	March 2003	22-007-XPB	15/149
The dairy review	Q1 2003	23-001-XIB	27/89
Fur statistics	2003	23-013-XIE	free
Production of poultry and eggs	2002	23-202-XIB	29
ANALYTICAL STUDIES			
Foreign affiliate trade statistics: Canadian operations abroad	1999 to 2001	11F0027MIE2003013	free
BALANCE OF PAYMENTS AND FINANCIAL FLOWS			
Canada's international transactions in securities	March 2003	67-002-XIE	14/132
COMMUNICATIONS			
Canada e-book		11-404-XIE	free
CULTURE, TOURISM AND THE CENTRE FOR EDUCATION STATISTICS			
Learning, earning and leaving: The relationship between working while in high school and dropping out		81-595-MIE2003004	free
CURRENT ECONOMIC ANALYSIS			
Canadian economic observer	May 2003	11-010-XIB	17/170
Canadian economic observer	May 2003	11-010-XPB	23/227
DISTRIBUTIVE TRADES			
Retail trade	March 2003	63-005-XIB	16/155
HEALTH STATISTICS			
Health indicators	2003, no. 1	82-221-XIE	free
Health regions: boundaries and correspondence with census geography	2003	82-402-XIE	free
Health reports	Vol. 14, no. 3	82-003-XIE	15/44
Health reports	Vol. 14, no. 3	82-003-XPE	20/58
MANUFACTURING, CONSTRUCTION AND ENERGY			
Construction type plywood	March 2003	35-001-XIB	5/47
Mineral wool including fibrous glass insulation	April 2003	44-004-XIB	5/47
PRICES			
Industry price indexes	March 2003	62-011-XIE	17/163
SERVICE INDUSTRIES			
Services indicators	Q4 2002	63-016-XIB	26/87
Services indicators	Q4 2002	63-016-XPB	35/116

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Calendar of key releases: June 2003				
Monday	Tuesday	Wednesday	Thursday	Friday
2	3 Impact of Advanced Technology Use on Firm Performance in the Canadian Food Processing Sector	4 Access to college and university: Does distance matter?, 1995 to 1999 Movie theatres and drive-ins, 2000-2001	5 Building permits, April 2003	6 Labour Force Survey, May 2003
9	10 Industrial capacity utilization rates, Q1 2003 New Housing Price Index, April 2003 Canadian social trends, Summer 2003	11 Quarterly financial statistics for enterprises, Q1 2003	12 New motor vehicle sales, April 2003 Labour productivity, hourly compensation and unit labour cost, Q1 2003	13 Canadian international merchandise trade, April 2003 Monthly Survey of Manufacturing, April 2003
16 Centre for Education Statistics: Information Bulletin, 2001/02 Challenges of late adolescence, 2000-2001	17 International investment position, Q1 2003 Small and Medium-sized Enterprise Financing in Canada in 2001	18 Canada's international transactions in securities, April 2003 Public sector statistics, 2003/03	19 General Social Survey: Caregiving, 2002 Low-income rates among immigrants, 1990-2000 Travel between Canada and other countries, April 2003	20 Consumer Price Index, May 2003 Wholesale trade, April 2003
23 Retail trade, April 2003 Digital divide in schools: Student access to and use of information technology	24 National balance sheet accounts, Q1 2003 Sexual Offences, 2001	25 Leading indicators, May 2003 Family income*	26 Preliminary estimates of principal field crop areas, 2003 Household Internet Use Survey, 2002 Employment, earnings and hours, April 2003	27 Gross domestic product by industry, April 2003 Industrial Product Price and Raw Materials Price Indexes, May 2003
30 National tourism indicators, Q1 2003 Employment Insurance, April 2003				

Note: Except for the releases marked with an asterisk, all the release dates in this calendar are fixed. A more detailed calendar of fixed release dates for the entire year is available from Statistics Canada's website at www.statcan.ca.