



# Infommat

## A Weekly Review

Friday, July 7, 2000

### OVERVIEW

#### ◆ Economic growth pauses for breath

Gross domestic product was little changed in April. The pause in growth followed a strong performance in March. The auto industry dragged down manufacturing output, whereas industries associated with the new economy fared well.

#### ◆ Raw material prices up substantially

In the wake of higher crude oil prices, manufacturers paid 24.9% more for their raw materials in May than they did in May 1999. This was up significantly from the annual increase of 19.5% in April, but still appreciably below the peak in February.

#### ◆ Industrial prices rise on higher oil prices

In May, manufacturers received 5.6% more for their products than they did a year earlier. Once again, oil prices were central to these gains.

#### ◆ Average weekly earnings virtually unchanged

In April, employees' average weekly earnings were virtually unchanged for a second month in a row at \$622.31. Compared with April 1999, average weekly earnings advanced 2.5%.

#### ◆ Canadians taking more pleasure trips in Canada

In 1999, for a second consecutive year, Canadians who travelled the most in Canada did so for pleasure. Last year, the number of pleasure trips rose 4.4% and represented 39% of all domestic travel.

### Economic growth pauses for breath

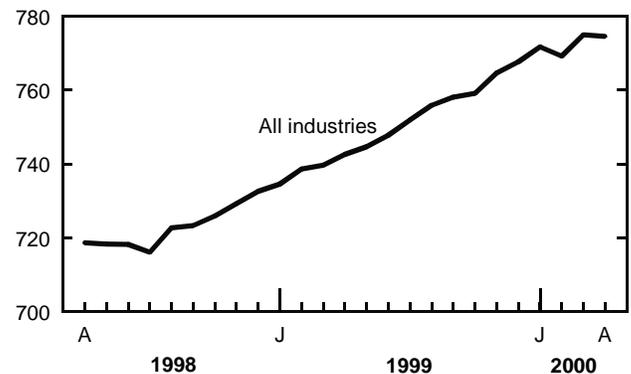
**G**ross domestic product (GDP) was little changed in April. The pause in growth followed a strong performance in March. Manufacturing output turned down (-0.9%), dragged down by the auto industry. That erased some of March's 1.7% increase. Overall, 14 of 22 major industry groups, accounting for about two-thirds of total manufacturing production, declined in April.

A 7.2% drop in export demand had auto manufacturers trimming production by 3.8%. April marked the fifth decline in output of cars and trucks in eight months, leaving production 13.4% below the peak reached in August 1999. The trimming at auto assembly plants led to a drop in the production (-4.7%) and importing (-3.8%) of auto parts. Nonetheless, April's output of cars and trucks was still 1.7% above year-earlier levels. Plant capacity added over the past two years allowed production to expand 22.4% in 1999.

Output of primary metal products fell 3.2%. A drop in primary steel production paralleled the decline in auto production, while curtailed demand for pipes and tubes mirrored lower construction activity. Makers of machined parts, metallic structures, wire products, hardware and tools and ready-mix concrete all cut back production in April. Output of wooden doors and window frames also fell, helping to pull down wood products manufacturing

#### Gross domestic product at factor cost

\$ billions (1992 dollars)



(continued on page 2)



### ... Economic growth pauses for breath

(-0.5%). Production of machinery dropped 1.3%. However, that was not enough to reverse the generally upward trend in the industry, which bottomed out in mid-1999. Output of plastic products declined (-1.8%) for a third time in four months.

Industries associated with the new economy fared well in April. Factories making electrical and electronic products boosted output 2.7%, as demand for telecommunications equipment picked up after flagging in the first quarter. Production of computers and peripherals rose sharply, building on a strong March gain. Printers' and publishers' output rose 0.9%, the fourth increase in five months. Factories making office desks and chairs were behind a 1.5% increase in the production of furniture.

The lower goods production hit transportation and storage firms (-1.9%). Trucking firms saw business fall off 2.9%. Rail output was hit hard by the high incidence of production cuts in bulk goods predominantly moved by rail, such as potash, wheat, iron ore and auto products. Increased air transportation partly offset these declines.

Retailers and wholesalers saw a poor month in April (-0.5% and -0.4% respectively), as sales of automobiles and building materials slumped. Excluding autos, retail sales were up slightly. Increased spending was seen at department and furniture stores, and sales rose at gasoline service stations. Wholesale sales receded despite new signs of life in computer sales, which had been dormant since topping out in mid-1999. A strike by cement truck drivers weighed on the construction industry (-0.5%), though activity was generally brisk outside the strike area.

Mining output rose 1.7%, the ninth increase in 10 months. Crude oil output rebounded after a maintenance shutdown. Drilling and rigging activity (+8.9%) continued to be bolstered by high oil and gas prices—resulting in the most sustained upswing in imports

#### Note to readers

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

of drilling and mining machinery in several years. Metal mine production rose 0.6%, reflecting the end of production difficulties and mine re-openings. However, mechanical problems at some mines reduced output of copper, lead and zinc. Non-metal mine output fell 1.6%. Asbestos production plummeted because of a temporary closure. A strike at one of the country's largest salt mines cut into salt production. However, diamond output climbed to its highest level in six months.

Despite the lower production in many energy-intensive industries, utilities' output rose 2.0% as temperatures east of the Rockies swung back to seasonable norms. Electricity production only partly retraced its steep March decline, whereas the gas distribution industry, whose product is mainly used for heating, bounced back to February levels. More long-distance telephone use led to a 1.7% rise in communications services output. Computer consulting activity lifted business services. A 10-day strike by 20,000 City of Toronto workers depressed output of municipal government services.

The April 2000 issue of *Gross domestic product by industry* (online at [www.statcan.ca](http://www.statcan.ca): 15-001-XIE, \$11/\$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](mailto:imad@statcan.ca)). For further analytical information, contact Richard Evans (613-951-9145; [evanric@statcan.ca](mailto:evanric@statcan.ca)), Industry Measures and Analysis Division. See also "Current trends" on page 7.

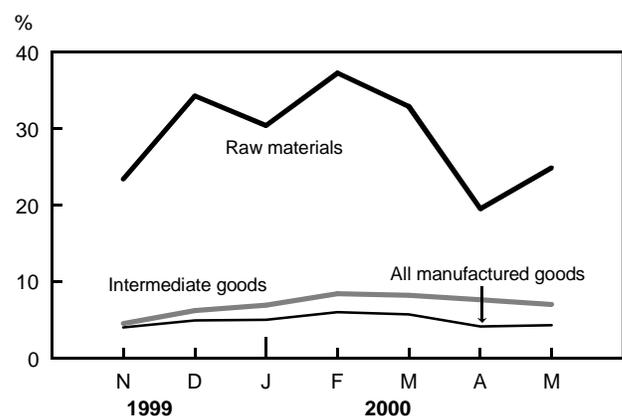
## Raw material prices up substantially

In the wake of higher crude oil prices, manufacturers paid 24.9% more for their raw materials in May than they did in May 1999. This was up significantly from the annual increase of 19.5% in April, but still appreciably below the peak of 37.3% in February. Crude oil prices moved higher as international hopes for lower oil prices failed in the face of relatively low crude oil inventories, particularly in North America.

From April to May, raw material prices surged 6.1%, as mineral fuels prices jumped 15.3%. Excluding mineral fuels, the monthly increase in raw material prices was 0.6%, and the annual increase was 6.8%, which was down from 8.1% in February. The annual increase in output prices of intermediate goods (goods that are used primarily as inputs in the manufacturing of other goods) was also down from its recent peak. In May, the annual increase was 7.3%, down from 8.4% in April.

Prices for raw materials other than mineral fuels increased 0.6% in May. Mostly, this was due to an increase in non-ferrous metal prices. The price level was also up for vegetable products and animal products, but was down for wood and ferrous materials. Competitive factors were the most common explanation for a decline in iron and steel scrap prices.

#### Annual changes in prices



Prices jumped 11.5% for copper concentrates, 5.9% for nickel prices and 3.6% for zinc prices. May's increase for copper was the first since January. The U.S. copper market was becoming increasingly tight. Demand in the United States for copper remained strong across most downstream market sectors. Nickel prices were up because of an anticipated strike at a major nickel

(continued on page 3)

### ... Raw material prices up substantially

producer. Zinc concentrates recovered to nearly the January price level. Zinc stocks are lower than they have been for some years, and world demand is strong given the widespread increases in industrial production.

#### Raw Materials Price Index, May 2000

Not seasonally adjusted

	Index (1992=100)	% change, previous month	% change, previous year
<b>Raw Materials Price Index (RMPI)</b>	<b>141.9</b>	<b>6.1</b>	<b>24.9</b>
Mineral fuels	179.4	15.3	68.0
Vegetable products	113.9	1.2	-2.0
Animals and animal products	122.9	0.2	11.2
Wood	141.4	-0.5	3.3
Ferrous metals	122.6	-1.4	7.0
Non-ferrous metals	118.3	3.4	11.4
Non-metallic minerals	120.0	0.0	1.4
<b>RMPI excluding mineral fuels</b>	<b>124.6</b>	<b>0.6</b>	<b>6.8</b>

#### Note to readers

*Crude oil makes up about one-third of raw materials, but only about 1% of inputs into the economy. Another 1% or so of inputs consist of petroleum products. Consequently, crude oil and petroleum products form only about 2% of the inputs into the economy.*

Wood prices were down in May, both for logs destined to sawmills and for pulpwood. Prices for sawmilling products were also down, and housing starts declined in both Canada and the United States. The decline in pulpwood prices occurred as prices rose slightly for pulp and remained flat for wood chips, a by-product of sawmilling.

Prices for canola—a genetically modified crop—have been weak throughout 1999 and to date in 2000. International demand for this commodity has declined in the face of the controversy over the cultivation of all genetically modified crops.

*The May 2000 issue of **Industry price indexes** (62-011-XPB, \$22/\$217) will be available at the end of this month. For further information, contact Client Services (613-951-3350, fax (613-951-1539, [infounit@statcan.ca](mailto:infounit@statcan.ca)), Prices Division.*

## Industrial prices rise on higher oil prices

**I**n May, manufacturers received 5.6% more for their products than they did a year earlier. Once again, oil prices were central to these gains. That 5.6% increase was the same as in April, a slight deceleration from the annual increases of 5.8% in March and 6.0% in February.

Compared with April, prices rose 0.3% in May. After having declined in April for the first time since February 1999, refined petroleum prices resumed their upward trend in May (+3.1%), partly on concerns of supply shortfalls for the upcoming summer driving season.

In the past year, the upward trend in petroleum product prices has had a substantial impact on the overall Industrial Product Price Index (IPPI). If petroleum and coal products had been excluded in May, the annual increase would have been reduced to 3.4% and the monthly increase would have been two-thirds (+0.2%) the actual increase.

Rising prices in the petroleum products industry have also contributed to monthly price increases in the organic chemicals industry (+1.1%), the plastic and synthetics resin industry (+1.0%) and the plastic products industry (+0.7%).

Price declines in lumber products (-4.0%) were the main offset to the upward price pressures in the IPPI. The decline was mostly due to lower prices for softwood. This followed a sharp decline in building permits issued in April, especially residential building permits. In May, housing starts were down in Canada (-10.4%) and in the United States (-3.4%), as were U.S. building permits.

Paper and paper product prices continued to strengthen in May (+1.2%). Monthly gains were seen in newsprint paper (+4.7%) and pulp (+0.8%) prices. Pulp prices were considerably higher

#### Exchange-rate effect

*Certain commodities, specifically motor vehicles, lumber, pulp, newsprint and certain metals, often have their prices quoted in U.S. dollars. Consequently, exchange rate fluctuations affect the Industrial Product Price Index (IPPI).*

*Between April and May, the U.S. dollar gained a little ground, pushing up prices that are quoted in U.S. dollars. If the exchange rate had remained unchanged, the IPPI would have advanced 0.2% instead of 0.3%.*

*The U.S. dollar was worth more in May than it was in May 1999. If the exchange rate had been the same in May 2000 as in May 1999, the IPPI would have risen 5.2% instead of 5.6%.*

than a year earlier in May (+30.6%), but they still remained 25.9% below their peak in November 1995. Prices for paper and paper products have climbed 14.1% compared with a year earlier.

Copper product prices jumped from April to May by 11.5%. The jump was mainly due to high demand for automotive, appliance, energy and industrial wire. Nickel product prices rose 5.1%, as concerns arose over a potential strike at a major producer. Compared with May 1999, nickel product prices have climbed 90.7%, reflecting robust demand from the stainless steel industry. Aluminum product prices continued to slip, dropping 2.3%. Even so, May's prices remained 5.7% above year-earlier levels. Overall, primary metal product prices increased 0.6% from April and 9.6% compared with a year earlier. Copper product prices accounted for the bulk of the annual advance.

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## Average weekly earnings virtually unchanged

In April, employees' average weekly earnings were virtually unchanged for a second month in a row at \$622.31 (-0.1%). Compared with April 1999, average weekly earnings advanced 2.5%, a rate of increase slightly above the 2.1% annual inflation rate seen in April's Consumer Price Index.

At the provincial level, the strongest annual increase in weekly earnings occurred in New Brunswick (+4.8%). Earnings in Newfoundland were virtually unchanged.

For hourly-rated employees, average weekly hours were down 0.2 hours in April to 31.7 hours. Average overtime hours were unchanged from March. Their average hourly earnings were also unchanged in April at \$15.76, but that was up compared with a year earlier by 3.5%.

In April, the number of employees on payrolls was almost unchanged compared with March. Payroll employment grew in manufacturing and business services. Those gains were offset, however, by losses in wholesale trade, retail trade and construction. By province, the only significant change in payroll employment in April occurred in Alberta (+6,200).

**Average weekly earnings, all industries, April 2000**  
Seasonally adjusted

	\$	% change, previous month	% change, previous year
<b>Canada</b>	<b>622.31</b>	<b>-0.1</b>	<b>2.5</b>
Newfoundland	552.13	-0.6	-0.1
Prince Edward Island	481.98	-1.8	0.4
Nova Scotia	524.17	0.4	0.3
New Brunswick	548.21	0.1	4.8
Quebec	581.00	-0.2	1.9
Ontario	664.63	0.0	3.1
Manitoba	560.64	0.0	2.7
Saskatchewan	553.30	-0.4	2.5
Alberta	637.78	-0.2	2.4
British Columbia	636.84	0.1	1.4
Yukon	695.69	-1.4	5.0
Northwest Territories, Nunavut	810.29	0.6	10.4

*The April 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. The annual averages for 1999 are also available. For further information, contact Jean Leduc (613-951-4090; labour@statcan.ca), Labour Division.*

## Canadians taking more pleasure trips within the country

In 1999, for a second consecutive year, Canadians who travelled the most in Canada did so for pleasure. Last year, the number of pleasure trips rose 4.4% and represented 39% of all domestic travel. That compares with 51.1 million trips to visit relatives or friends (-1.9%), 19.4 million business and convention trips (-2.7%), and 18.7 million personal or "other" trips (+1.6%).

Overall, Canadians' domestic travel remained relatively stable last year at 145.4 million trips. That compares with 144.3 million in 1998. Domestic travel weakened during the second half of 1999, as travel by Canadians to the United States increased and gasoline prices surged. The 1999 spending for domestic travel totalled \$19.8 billion (+4.7%). The increase was primarily owing to higher travel expenditures, up 4.6% to \$7.7 billion. As well as the gasoline price increases, local transportation prices rose and the number of trips made by bus and by car both increased last year.

Trips by bus jumped 10.1% to 3.8 million trips. More than one-fifth of these trips were made by travellers aged 65 or over—a 26.2% increase from the previous year. Travel by car—92% of all domestic trips in 1999—rose slightly to 133.6 million trips. Travellers aged 45 to 54 and those aged 65 and over contributed

### Note to readers

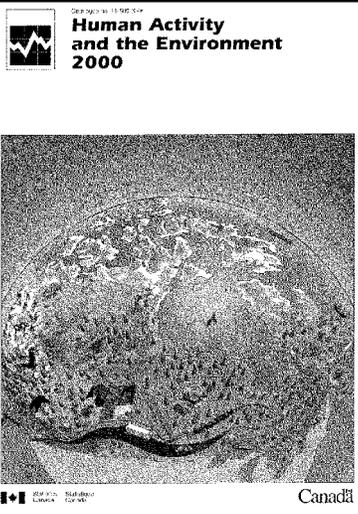
*Domestic travel is defined as any trip of 80 kilometres or more one way taken by Canadian residents and having a Canadian destination.*

the most to sustaining domestic travel by car. Travel by plane was down 4.6% to 6.1 million trips, however, due to a decline in business travel. Travel by train, boat or other means fell 11.3% to 1.9 million trips.

Of the 145.4 million domestic trips taken last year, 70.8 million were same-day (+1.4%), and 74.6 million included at least one night (+0.2%). The number of nights Canadians stayed away from home decreased marginally to 243.8 million nights. Overnights at a commercial establishment fell 1.7% to 92.6 million nights, whereas, stays with relatives or friends or at other private establishments rose 0.2% to 151.2 million nights.

*Basic data on domestic travel can be accessed free on Statistics Canada's Web site (www.statcan.ca). Look under "Canadian statistics". Various statistical profiles and microdata files are available upon request by contacting Michel Campbell (613-951-9169; michel.campbell@statcan.ca). For further analytical information, contact Lizette Gervais-Simard (613-951-1672; gervliz@statcan.ca), Tourism Statistics Program.*

## New from Statistics Canada




**Human Activity and the Environment 2000**  
11-509-XPE

11-509-XPE

### Human activity and the environment 2000

*Human activity and the environment*, published every five years, is Statistics Canada's compilation of economic, social and environmental statistics. Researchers, policy-makers, teachers and students will find it indispensable for environmental analysis.

The report gathers data from a wide variety of sources, and so it provides a comprehensive statistical portrait of the nation's environment. It places an emphasis on human activity and its relationship to natural systems—air, water, soil, plants and animals.

The book contains 272 tables, 137 figures, and 45 colour maps covering a multitude of environmental topics. It is supplemented by a detailed glossary, an index, a teacher's kit (to come) and a CD-ROM. The CD-ROM includes all aspects of the printed report in HTML format, along with additional data tables, graphics and a customized mapping and graphing tool.

*Human activity and the environment, 2000 (11-509-XPE, \$75, including CD-ROM) is now available. For more information, contact Murray Cameron (613-951-3740; camemur@statcan.ca) or Martin Lemire (613-951-5739; lemimar@statcan.ca), Environment Accounts and Statistics Division.*

### Multinational firms and the innovation process

This study challenges past conventional wisdom that has sometimes taken a jaundiced view of multinationals' role in Canada. While foreign-owned firms operating in Canada have generally been seen as providing a conduit for introducing new technologies into Canada, some have seen multinationals as fostering a branch-plant mentality with an underdeveloped or truncated research and development capacity in Canada.

This study supports more recent views that multinationals decentralize activities from their home country to subsidiaries in Canada to exploit local competencies. It finds that even though foreign subsidiaries have a privileged access to their parent company's research and development and technology, they perform research and development in Canada more often than do Canadian-owned firms that serve the local economy.

The study also examines whether multinationals are closely tied into Canadian innovation networks such as universities, whether innovations have been introduced, and the use that is made of intellectual property rights.

*The new analytical study, **Multinationals and the Canadian innovation process** (print: 11F0019MPE; online at [www.statcan.ca](http://www.statcan.ca): 11F0019MIE, no. 151), is now available. To obtain a copy, contact Louise Laurin (613-951-4676), or visit Statistics Canada's Web site. Look under "Products and services", followed by "Downloadable research papers". For more information on the study, contact John Baldwin (613-951-8588), Micro-economic Analysis Division.*

## New from Statistics Canada

### Canada/European Union merchandise trade reconciliation

1993 to 1997

Statistics Canada and Eurostat have announced the results of a merchandise trade reconciliation study. It examines the causes of the differences in the published statistics of each trading partner from 1993 to 1997. The results do not represent revisions to the officially published statistics of any of the participating countries. This study was undertaken jointly by the International Trade Division of Statistics Canada and Eurostat on behalf of the European Union (EU).

As a result of this examination, published Canadian exports to the EU were adjusted upward, while the corresponding published EU imports from Canada were adjusted downward for each year of the study.

*To obtain a copy of **Canada/European Union merchandise trade reconciliation, 1993 to 1997**, contact Jocelyne Elibani (613-951-9786; fax 613-951-0117; trade@statcan.ca), International Trade Division.*

### Justice factfinder

1998

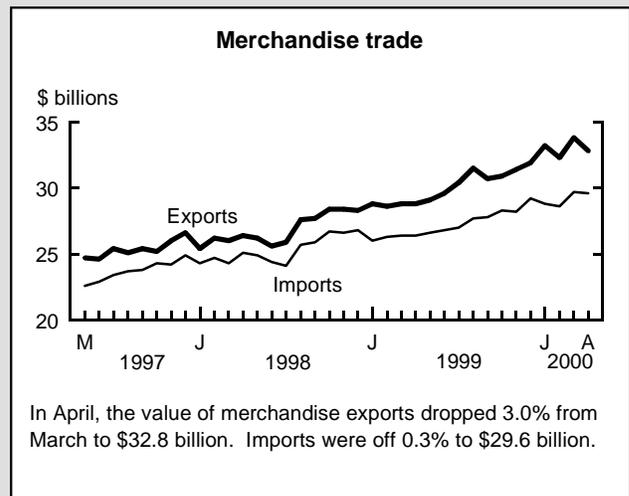
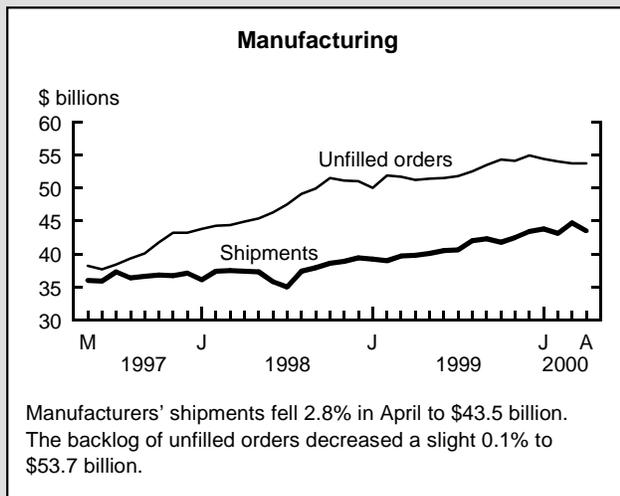
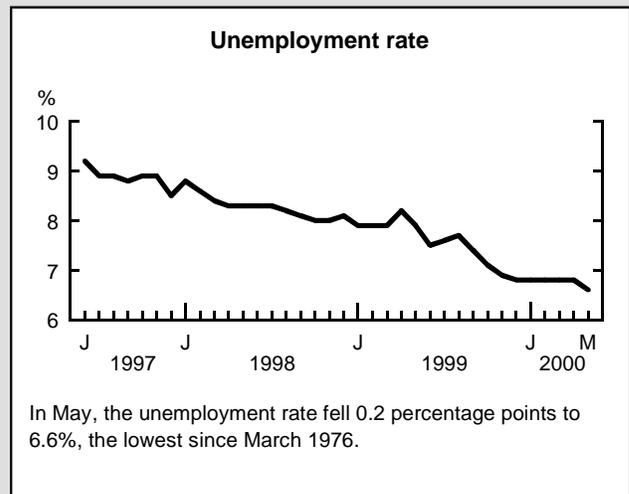
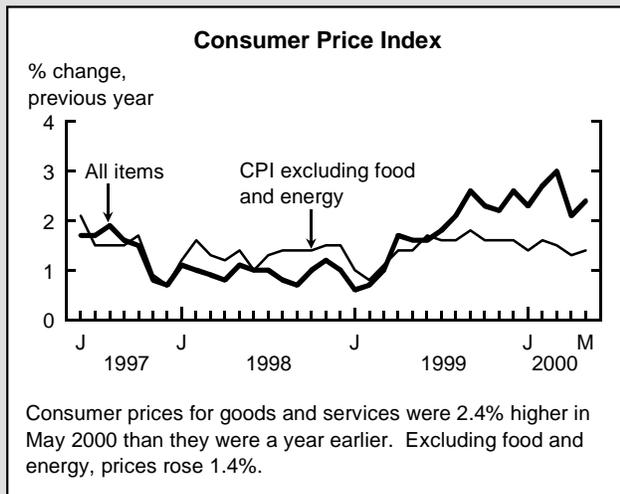
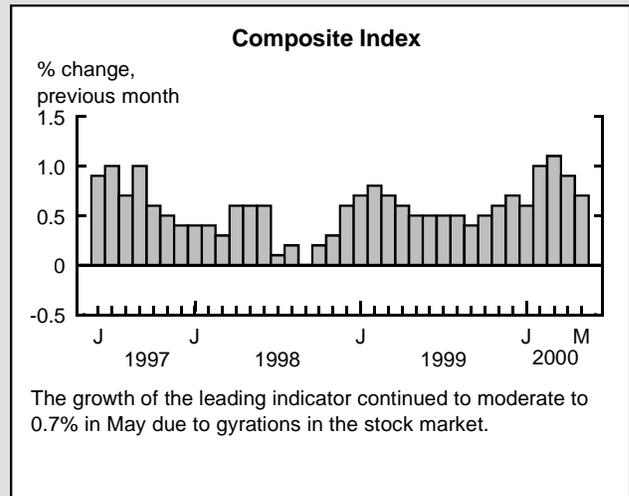
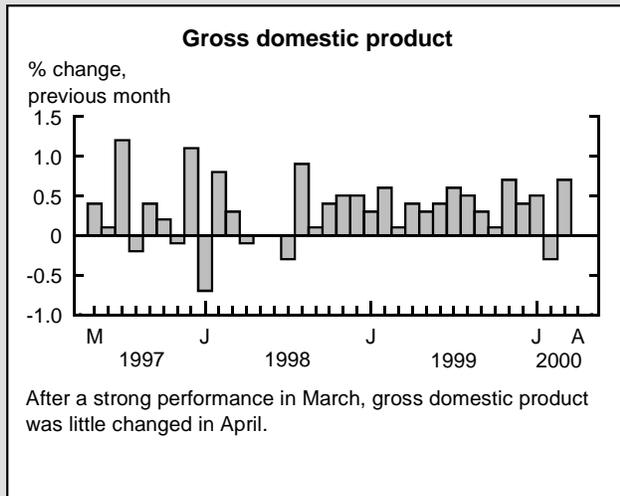
The 1998 edition of *Juristat: The justice factfinder* highlights findings from recent surveys and publications produced by the Canadian Centre for Justice Statistics. Most of the data cover the period up to the end of 1998.

The information, presented in a question-and-answer format, is designed to respond in detail to questions frequently asked by the justice community, the media and the public concerning crime and the justice system—What kinds of offences do youths commit? Should we be concerned about the presence of firearms? How many people are under correctional supervision?

This short report also contains detailed information on police-reported crime, offences committed by youth, victimization of children, issues for Canadian courts and the overall cost of justice services.

***Juristat, vol. 20, no. 4: The justice factfinder, 1998** (print: 85-002-XPE, \$10/\$93; online at [www.statcan.ca](http://www.statcan.ca): 85-002-XIE, \$8/\$70) is now available. For further information, contact Information and Client Services (1 800 387-2231; 613-951-9023), Canadian Centre for Justice Statistics.*

## Current trends



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

## Latest statistics

	Period	Level	Change, previous period	Change, previous year
<b>GENERAL</b>				
Gross domestic product (\$ billion, 1992)	April*	774.6	0.0%	4.3%
Composite Index (1992=100)	May	162.7	0.7%	8.4%
Operating profits of enterprises (\$ billion)	Q1 2000	53.3	12.3%	37.5%
Capacity utilization (%)	Q1 2000	87.6	1.1†	4.3†
<b>DOMESTIC DEMAND</b>				
Retail trade (\$ billion)	April	22.6	-1.2%	5.7%
Department store sales (\$ billions)	May*	1.49	-0.2%	-0.3%
New motor vehicle sales (thousand of units)	April	133.2	-1.1%	4.2%
Wholesale trade (\$ billion)	April	31.6	-0.2%	8.5%
<b>LABOUR</b>				
Employment (millions)	May	14.91	0.3%	2.8%
Unemployment rate (%)	May	6.6	-0.2†	-1.3†
Participation rate (%)	May	65.8	0.0†	0.0†
Average weekly earnings (\$)	April	622.31	-0.1%	2.5%
Help-wanted Index (1996=100)	June*	169	0.0%	6.3%
<b>INTERNATIONAL TRADE</b>				
Merchandise exports (\$ billion)	April	32.8	-3.0%	14.0%
Merchandise imports (\$ billion)	April	29.6	-0.3%	12.6%
Merchandise trade balance (all figures in \$ billion)	April	3.2	-0.9	0.7
<b>MANUFACTURING</b>				
Shipments (\$ billion)	April	43.5	-2.8%	9.3%
New orders (\$ billion)	April	43.4	-2.3%	10.7%
Unfilled orders (\$ billion)	April	53.7	-0.1%	4.9%
Inventory/shipments ratio	April	1.33	0.05	0.02
<b>PRICES</b>				
Consumer Price Index (1992=100)	May	113.0	0.5%	2.4%
Industrial Product Price Index (1992=100)	May	127.2	0.3%	5.6%
Raw Materials Price Index (1992=100)	May	141.9	6.1%	24.9%
New Housing Price Index (1992=100)	April	102.7	0.2%	2.1%

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

\* new this week

† percentage point

# Infomat

## A weekly review

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 information. It also contains schedules of upcoming major news releases and announces  
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## Publications released from June 29 to July 5, 2000

Division/Title of publication	Period	Catalogue number	Price (\$) (issue/subscription)
<b>AGRICULTURE</b>			
Extraction system of agricultural statistics	2000	21F0001XCB	625/295
Field crop reporting series, vol. 79, no. 4: Preliminary estimates of principal field crop areas, Canada	2000		
Internet		22-002-XIB	11/66
Paper		22-002-XPB	15/88
Food consumption in Canada, part 1	1999		
Internet		32-229-XIB	26
Paper		32-229-XPB	35
Fruit and vegetable production	June 2000	22-003-XIB	23/46
<b>BALANCE OF PAYMENTS AND FINANCIAL FLOWS</b>			
Canada's international transactions in services	1999		
Internet		67-203-XIB	30
Paper		67-203-XPB	40
<b>DISTRIBUTIVE TRADES</b>			
Retail trade	April 2000	63-005-XPB	21/206
<b>ENVIRONMENT ACCOUNTS AND STATISTICS PROGRAM</b>			
Human activity and the environment	2000	11-509-XPE	75
<b>LABOUR STATISTICS</b>			
Tables and analytical document: Estimates of labour income, monthly estimates	April 2000		
Diskette		13F0016XDB	2.50/1,000
Paper		13F0016XPB	20/200
<b>MANUFACTURING, CONSTRUCTION AND ENERGY</b>			
Asphalt roofing	May 2000	45-001-XIB	5/47
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