



# Infommat

## A Weekly Review

Friday, August 29, 2003

### INSIDE

◆ **Retail sales up for second consecutive month**

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◆ **Merchandise trade balance tumbles for third straight month**

Canada's merchandise trade balance fell for the third consecutive month to \$3.6 billion, its lowest level since October 1999, as the 3.2% decline in exports outpaced the 2.2% drop in imports.

◆ **Lacklustre second quarter for factory shipments**

Manufacturing shipments decreased 0.5% to \$41.9 billion in June, culminating in a lacklustre second quarter. Manufacturers sliced 4.4% off shipments in the second quarter, wiping out the first quarter's gains.

◆ **Crop production on the rebound**

Production of most major field crops in 2003 is expected to rebound from last year's poor showing, according to results from the pre-harvest survey of Canadian farmers as of July 31, 2003.

◆ **Productivity surges among exporters**

Companies that expanded into export markets during the 1990s as a result of free trade had a profound impact on the growth of productivity in the country's manufacturing sector, according to a new research paper.

### Inflation dips to lowest level in a year

**I**nflation as measured by the Consumer Price Index fell to a one-year low in July with most of the downward pressure coming from lower prices for travel accommodation, clothing and footwear.

Consumers paid 2.2% more for the goods and services in the CPI basket in July, the smallest year-over-year increase since July 2002. This was down from 2.6% in June, and well off the peak of 4.6% in February.

Excluding the eight most volatile components as defined by the Bank of Canada, the index rose 1.8% between July 2002 and July 2003. It was the smallest 12-month advance since January 2002, and followed a 12-month gain of 2.1% in June.

*(continued on page 2)*

#### Consumer Price Index, July 2003

% change, previous year, not seasonally adjusted

	All-items	Food	Shelter	Transportation	Energy
<b>Canada</b>	<b>2.2</b>	<b>1.9</b>	<b>3.9</b>	<b>3.3</b>	<b>6.7</b>
Newfoundland and Labrador	2.8	0.5	3.5	6.0	3.9
Prince Edward Island	2.6	1.3	4.0	3.5	7.0
Nova Scotia	2.6	2.1	4.5	2.0	4.6
New Brunswick	2.5	2.3	2.2	5.0	3.4
Quebec	1.8	2.1	3.2	4.2	2.2
Ontario	1.9	1.9	3.7	3.7	8.5
Manitoba	0.9	1.7	1.2	-1.7	-1.2
Saskatchewan	1.9	2.3	4.0	0.5	4.5
Alberta	4.4	1.4	11.2	5.3	25.5
British Columbia	1.7	2.5	1.7	1.0	2.8
Whitehorse	1.2	1.8	1.2	2.9	2.6
Yellowknife	0.9	-0.5	1.6	-0.2	4.6

#### Note to readers

Infommat was unable to publish on Friday, August 22, 2003, due to the power situation in Ontario. Statistics Canada regrets any inconvenience this may have caused.



### **Inflation dips to...** *(continued from page 1)*

The majority of the 12-month increase in the all-items CPI was due to gains within the shelter and transportation components. Within shelter, upward pressure came from natural gas and homeowners' replacement cost. For transportation, it came from higher automotive vehicle insurance premiums.

In July, energy prices were 6.7% higher than in July 2002. The majority of this gain was attributable to a 55.8% increase in the price of natural gas. Higher prices for fuel oil (+10.5%) also contributed, while lower prices for electricity (-2.6%) and gasoline (-0.1%) exerted some downward pressure.

Most of the year-over-year downward pressure came from lower prices for travel accommodation, clothing and footwear. Accommodation prices were 14.4% below July 2002 levels, as the tourism industry faced the effects of a higher Canadian dollar, along with the outbreak of severe acute respiratory syndrome (SARS) in Toronto and a general economic slowdown.

On a monthly basis, the CPI edged up 0.1% from June to July for the third straight month. Increases in gasoline, men's clothing and air transportation prices were almost entirely offset by

decreases for automotive vehicle purchases and beef. Beef prices fell 5.0%, the largest monthly decline since the mid-1970s.

Consumers paid 0.4% more for energy in July than in June. Higher gasoline prices (+1.9%) were partly offset by lower prices for electricity (-0.9%) and natural gas (-0.9%). Gasoline prices were up in all provinces except Prince Edward Island where prices are regulated.

After dropping 5.1% in June, the index for men's clothing rebounded 3.4%, as widespread sales came to an end.

Air transportation costs climbed 3.1% from June to July. Increases are typical in July, reflecting in large part the peak season for travel. However, this year's advance was far below the average of 9.0% for the past three years.

Prices for automotive vehicles were down 0.9% in July, following a 1.5% decrease in June, primarily a result of additional incentives from manufacturers. The index for automotive vehicles is now at its lowest level since October 1997.

*For more information, contact Joanne Moreau (613-951-7130), Prices Division. (See also "Current trends" on page 6.)*

## **Retail sales up for second consecutive month**

**C**onsumer spending in retail stores increased for the second straight month in June, as all sectors except the automotive posted gains, and clothing sales reached a record monthly high.

Retail sales hit \$26.4 billion, up 0.3% from May, which followed a 0.5% gain the month before. However, these back-to-back increases failed to make up entirely for lost ground in March and April. That left sales just below their peak in February 2003.

The only area posting a decline was the automotive sector, where sales fell 1.1%. If the sector's largest component, motor and recreational vehicle dealers, were excluded, total retail sales would be up 1.2%.

Consumers flocked to clothing stores where sales rose 1.0% to a record monthly high of nearly \$1.4 billion. This followed a 2.2% increase in May.

Other areas reporting large gains were the food sector (+1.9%) and the "other" retail category (+1.9%), which includes stores such as liquor, sporting goods and jewellery. Sales increases were moderate in three other sectors: furniture (+0.3%), drug (+0.2%) and general merchandise (+0.1%).

Food stores have experienced robust growth in the first half of 2003, with year-over-year gains averaging 6.5% per month, compared with 4.5% in the same period last year.

Sales in the overall automotive sector fell despite advances in auto parts, accessories and services stores (+1.4%) and gasoline service stations (+0.9%).

Provincially, consumer spending in retail stores increased in all provinces in June, except Prince Edward Island (-1.0%), Saskatchewan (-0.9%) and Ontario (-0.1%).

Sales by Ontario retailers remained essentially steady after bouncing back from the SARS-induced decline reported in April. Plunging sales in the automotive sector, caused by a significant 14.5% drop in the number of new motor vehicles sold in June, were offset by increases in the remaining retail sectors in Ontario.

The largest sales gains in June were posted by retailers in the Atlantic provinces, except Prince Edward Island. Retail sales advanced by more than 1.0% in Newfoundland and Labrador, New Brunswick and Nova Scotia. Generally, retailers in these provinces enjoyed renewed growth since the fall of 2002, after experiencing essentially flat sales in the previous months.

*For more information, contact Paul Gratton (613-951-3541; cell: 613-293-2397; paul.gratton@statcan.ca), Distributive Trades Division.*

## Merchandise trade balance tumbles for third straight month

Canada's merchandise trade balance fell for the third consecutive month to \$3.6 billion, its lowest level since October 1999, as the 3.2% decline in exports outpaced the 2.2% drop in imports.

Canadian exporters sent \$31.6 billion of goods abroad in June, the lowest level since September 1999. This occurred as a result of weak aircraft, automotive and agricultural exports. In addition, 34 countries closed their borders to Canadian beef exports for the entire month.

Total imports for June fell to \$28.0 billion, their lowest level since January 2002. All sectors, except energy and machinery and equipment, decreased or remained unchanged.

Although exports to the United States dropped 1.6% in June to \$26.5 billion, Canada's imports from there plunged 3.8%, resulting in an increase in the trade surplus with the United States to just under \$7.2 billion.

Exports of agricultural products slipped 6.4% to \$2.2 billion in June. On May 20, a single cow infected with bovine spongiform encephalopathy (BSE) led the United States, Japan and 32 other countries to close their borders to Canadian beef exports.

*For more information, contact Daryl Keen (613-951-1810), International Trade Division. (See also "Current trends" on page 6.)*

## Lacklustre second quarter for factory shipments

Manufacturing shipments decreased 0.5% to \$41.9 billion in June, culminating in a lacklustre second quarter. Manufacturers sliced 4.4% off shipments in the second quarter, wiping out the first quarter's gains.

Other manufacturing indicators reported mixed signals. Unfilled orders continued to slide in June (-1.3%), the tenth consecutive decline. On the positive front, inventory levels decreased for the second month in a row and new orders also picked up in June, following a two-month decline.

Shipments decreased in 14 of 21 industries in June, accounting for 78% of total shipments. The trend for shipments has remained negative for the eighth consecutive month.

Six provinces reported lower shipments in June. Shipments in Ontario, which bore the brunt of the drop, fell 1.8% to a four-month low of \$22.3 billion. In British Columbia, they declined 1.5% to \$2.7 billion. The slide was concentrated in the paper and chemical industries. In Alberta, which was badly hit by the closure of the international export market for beef products, shipments fell 4.0%.

A significantly stronger Canadian dollar, coupled with the impact of mad cow disease in Alberta, contributed to the second-quarter downturn in manufacturing. The US economy, however, showed early indications of a modest recovery.

*For more information, contact Daniela Ravindra (613-951-3514; ravidan@statcan.ca), Manufacturing, Construction and Energy Division. (See also "Current trends" on page 6.)*

## New motor vehicle sales

New motor vehicle sales continued to seesaw, with sales dropping 10.2% in June after rising sharply 9.1% in May. In all, 129,997 new vehicles were sold in June, down 14,832 units from May, when an increase of 12,136 units was reported.

In June, the number of new passenger cars sold was down compared with May, falling 8.6% to 70,031. Sales of new passenger cars have been following a downward movement since the fall of 2002.

The number of new trucks sold in June was down 12.1% from May to 59,966 vehicles. This decline followed a strong increase of 11.8% in May.

With the drop recorded in June, the cumulative number of new motor vehicles sold in the first six months of 2003 was down 5.1% from the same period of 2002, a record year. Since the start of 2003, cumulative sales have consistently been lower than those for 2002.

*For more information, contact Clérance Kimanyi (613-951-6363; clerance.kimanyi@statcan.ca), Distributive Trades Division.*

## Crop production on the rebound

Production of most major field crops in 2003 is expected to rebound from last year's poor showing, according to results from the pre-harvest survey of Canadian farmers as of July 31, 2003.

In spite of insect damage and hot, dry weather in the West, crop production will easily surpass the drought year of 2002.

Total wheat production is expected to reach 21.0 million tonnes, up 34% or 5.3 million tonnes from last year. The anticipated average yield is estimated at 29.8 bushels per acre, up from 27.1 last year.

Spring wheat production in the West is expected to rise a sharp 42% to 14.2 million tonnes, the result of increases in yield and harvested area. Alberta growers anticipate an 83% increase, and Saskatchewan farmers, a 54% increase. In Manitoba, farmers expect an 11% decline.

Production of durum wheat, used to make pasta, is expected to rise just 2% to 3.8 million tonnes. While harvested acreage is up, yields are expected to drop an estimated 9% to an average 23.1 bushels per acre.

Western Canadian barley production should rise to near-average levels this year. Production is estimated at 11.0 million tonnes,

### Production estimates as of July 31, 2003

	2002	2003	2002 to 2003
	'000 tonnes		% change
Total wheat	15,690	20,966	34
Spring wheat	10,423	14,542	40
Barley	7,283	12,025	65
Canola	3,577	6,230	74
Durum wheat	3,714	3,778	2
Oats	2,749	4,048	47
Field peas	1,366	2,254	65
Flaxseed	679	793	17
Rye	134	301	125
Soybeans <sup>1</sup>	2,220	2,560	15
Grain corn <sup>1</sup>	8,657	8,788	2

<sup>1</sup> Quebec and Ontario only.

up 4.8 million tonnes. Yields will continue below-average at 47.4 bushels per acre.

For more information, contact Karen Gray (204-983-2856; karen.gray@statcan.ca), Agriculture Division.

### Leading indicators

The composite leading index posted its largest increase in a year with a 0.4% gain in July, after a 0.3% advance in June. The improved prospects for growth reflect continued strength in household spending and an upturn in business investment. Even the export sector picked up after being a principal source of the slowdown so far this year. The one negative component was due to rising inventories in the manufacturing sector

All of the indicators related to household demand improved. Housing recorded its third straight increase, as starts of multiple units surged. The stock market picked up steam in July, lifting growth over the last four months to its strongest since August 2000.

In manufacturing, rising inventories in export-based industries where sales slumped, raised the overall ratio of shipments to inventories for the fourth straight month. These industries also led the cuts to production and the average workweek in May. The overall trend of hours worked was stabilized by gains in several consumer-related industries, which hit their highest level on record back to 1991.

For more information, contact Francine Roy (613-951-3627), Current Economic Analysis Group.

## Productivity surges among exporters

Companies that expanded into export markets during the 1990s as a result of free trade had a profound impact on the growth of productivity in the country's manufacturing sector, according to a new research paper.

The study, which tracked export activity among manufacturing plants over a two-decade period from 1974 to 1996, showed that a substantial part of total gains in productivity that occurred during the 1990s came from manufacturing plants that were exporters.

These plants accounted for almost three-quarters of productivity growth during the decade, even though they accounted for less than 50% of employment.

The study, released by Statistics Canada and published in the August issue of the *Canadian Journal of Economics*, showed that more productive plants participate in export markets. Once they become exporters, the more successful plants go through a learning process, and as a result, improve their productivity even further, relative to their counterparts that do not export.

Productivity, measured by output per worker, is closely associated with increases in the standard of living. Productivity grows when firms enhance the amount of capital that each employee can utilize, as well as when firms grow in size. Growth in productivity can also occur as a result of other efficiency improvements.

From 1974 to 1996, the proportion of plants that exported increased from 16% to 24%. At the same time, the proportion of their shipments that went into export markets increased from 24% to 33%.

The study found that the more productive plants generally participate in export markets. Among plants that were initially non-exporters, it was the more productive ones that expanded into export markets, while the less productive plants remained non-exporters.

As well, among the plants that were in export markets, the more productive ones were more likely to remain there.

Exporting had a second effect on productivity growth. For those plants that exported continuously throughout each period, productivity increased more rapidly when the export intensity of these plants, that is, the ratio of exports to production, increased.

The productivity gains from moving into export markets were greater for domestic-controlled plants. They were also greater for younger plants than for older plants.

Younger plants and domestic plants were more likely to benefit from information gain during exposure to foreign markets, because their information acquisition systems were less fully developed than either older or foreign-owned plants.

While this study demonstrated that participation in export markets improved productivity, it did not fully answer how this occurred. However, one source may be accumulation of capital, in that exporting activities are associated with a transformation of production processes from being less capital intensive to more capital intensive. Future studies will explore sources of productivity gains from exporting.

*The research paper **Participation in export markets and productivity performance in Canadian manufacturing (11F0027MIE2003011, free)** is now available on the Statistics Canada website ([www.statcan.ca](http://www.statcan.ca)). For more information, contact John Baldwin (613-951-8588), Micro-economic Analysis Division.*

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### Livestock estimates

The number of cattle on Canadian farms reached a record high in June following the closure of the US border to Canadian cattle and beef, amid concerns about mad cow disease. Meanwhile, hog inventories remained stable.

The national herd of cattle and calves rose 1.9% by the end of June, compared with June 2002, the result of limited foreign markets for Canadian cattle and beef. The vast majority of exports normally go to the United States. According to a survey of 25,000 farmers, livestock producers held a record 15.7 million head of cattle on their farms as of July 1.

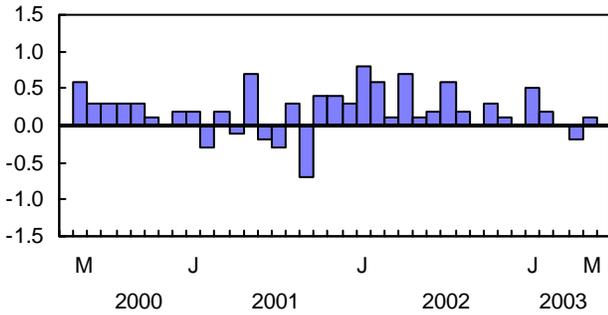
The oversupply of cattle has depressed prices for all cattle, including slaughter animals, feeders and calves. Prices have plunged by about 40% since May.

*For more information, contact Robert Plourde (613-951-8716; [robert.plourde@statcan.ca](mailto:robert.plourde@statcan.ca)) or Mark Elward (613-715-3966), Agriculture Division.*

## Current trends

### Gross domestic product

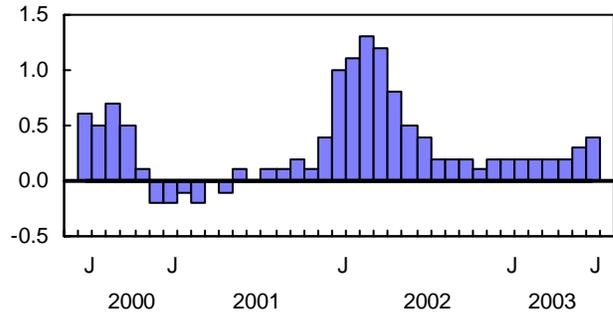
% change, previous month



Total economic activity rose 0.1% in May, after dropping 0.2% in April.

### Composite Index

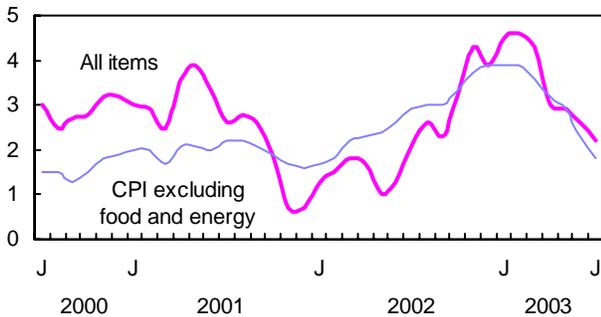
% change, previous month



The leading indicator grew 0.4% in July after rising 0.3% in June.

### Consumer Price Index

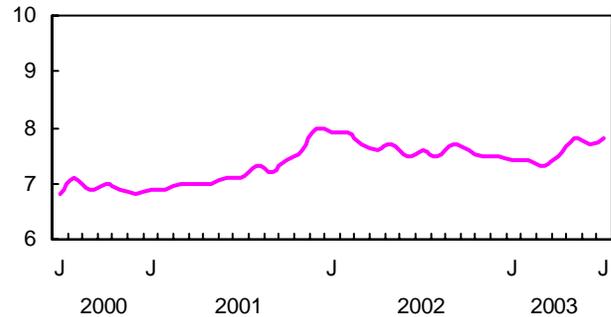
% change, previous year



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

### Unemployment rate

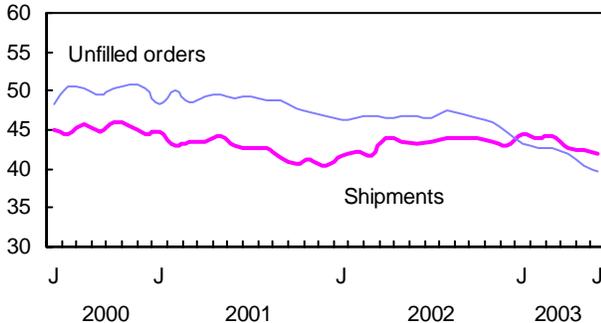
%



In June, the unemployment rate rose 0.1 percentage points to 7.8%.

### Manufacturing

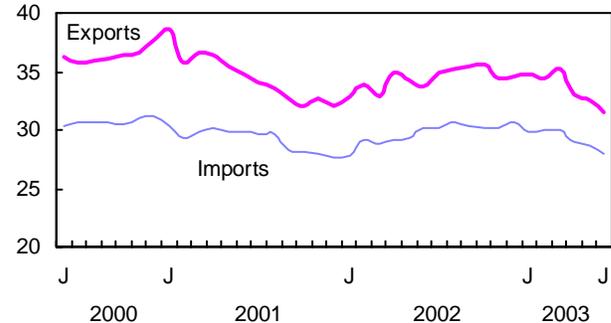
\$ billions



Manufacturers' shipments fell 0.5% in June to \$41.9 billion. The backlog of unfilled orders declined 1.3% to \$39.6 billion.

### Merchandise trade

\$ billions



In June, the value of merchandise exports dropped 3.2% to \$31.6 billion. Imports fell 2.2% to \$28.0 billion.

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 (\$ billions, 1997) <sup>1</sup>	May	992.5	0.1%	1.8%
Composite Index (1992=100)	July*	182.5	0.4%	2.4%
Operating profits of enterprises (\$ billions)	Q2 2003*	40.4	-1.3%	11.7%
Capacity utilization rate (%) <sup>2</sup>	Q1 2003	82.8	0.3†	1.2†
<b>DOMESTIC DEMAND</b>				
Retail trade (\$ billions)	June*	26.4	0.3%	2.7%
New motor vehicle sales (thousands of units)	June	130.0	-10.2%	-8.9%
Wholesale trade (\$ billions)	June*	35.8	0.0%	3.3%
<b>LABOUR</b>				
Employment (millions)	July	15.7	-0.1%	1.9%
Unemployment rate (%)	July	7.8	0.1	0.2†
Participation rate (%)	July	67.5	0.0†	0.6†
Average weekly earnings (\$)	June*	693.29	0.9%	2.1%
Regular Employment Insurance beneficiaries (in thousands)	May	561.4	2.7%	0.3%
<b>INTERNATIONAL TRADE</b>				
Merchandise exports (\$ billions)	June	31.6	-3.8%	-6.5%
Merchandise imports (\$ billions)	June	28.0	-2.2%	-7.0%
Merchandise trade balance (all figures in \$ billions)	June	3.6	-0.4	-0.1
<b>MANUFACTURING</b>				
Shipments (\$ billions)	June*	41.9	-0.5%	-3.1%
New orders (\$ billions)	June*	41.4	2.0%	-4.7%
Unfilled orders (\$ billions)	June*	39.6	-1.3%	-15.6%
Inventory/shipments ratio	June*	1.50	-0.01	0.07
<b>PRICES</b>				
Consumer Price Index (1992=100)	July*	122.2	0.1%	2.2%
Industrial Product Price Index (1997=100)	June	103.9	-1.0%	-2.7%
Raw Materials Price Index (1997=100)	June	114.3	1.2%	3.2%
New Housing Price Index (1992=100)	June	116.3	0.3%	4.5%

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

\* new this week

† percentage point

<sup>1</sup> 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.

<sup>2</sup> 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.

# Infomat

## A weekly review

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## Products released from August 14 to 27, 2003

SUBJECT AREA Title of product	Period	Catalogue number	Price (\$) (issue/subscription)
<b>AGRICULTURE</b>			
Cattle statistics	2003	23-012-XIE	free
Fur statistics	2003	23-013-XIE	free
Hog statistics	2003	23-010-XIE	free
Sheep statistics	2003	23-011-XIE	free
<b>ANALYTICAL STUDIES</b>			
Economic analysis research paper series: Participation in export markets and productivity performance in Canadian manufacturing, no. 11		11F0027MIE2003011	free
<b>CULTURE, TOURISM AND THE CENTRE FOR EDUCATION STATISTICS</b>			
International travel, advance information, Vol. 19, no. 6		66-001-PIE	6/55
<b>DISTRIBUTIVE TRADES</b>			
New motor vehicle sales	June 2003	63-007-XIB	13/124
Retail trade	June 2003	63-005-XIB	16/155
Wholesale trade	June 2003	63-008-XIB	14/140
<b>ENVIRONMENT STATISTICS PROGRAM</b>			
Environmental protection expenditures in the business sector	2000	16F0006XIE	free
<b>INTERNATIONAL TRADE</b>			
Imports by commodity	June 2003	65-007-XMB	37/361
Imports by commodity	June 2003	65-007-XPB	78/773
<b>LABOUR AND HOUSEHOLD SURVEYS ANALYSIS</b>			
Perspectives on labour and income	August 2003	75-001-XIE	5/48
<b>MANUFACTURING, CONSTRUCTION AND ENERGY</b>			
Energy statistics handbook	Q1 2003	57-601-XCB	150
Energy statistics handbook	Q1 2003	57-601-XIE	35/100
Monthly Survey of Manufacturing	June 2003	31-001-XIE	15/147
Production and shipments of steel pipe and tubing	June 2003	41-011-XIB	5/47
Sawmills and planing mills, Vol. 57, no. 5	35-003-XIB	9/86	
Steel wire and specified wire products	June 2003	41-006-XIB	5/47
<b>PRICES</b>			
Industry price indexes	June 2003	62-011-XPE	22/217
The Consumer Price Index	July 2003	62-001-XIB	8/77
The Consumer Price Index	July 2003	62-001-XPB	11/103

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## Calendar of key releases: September 2003

Monday	Tuesday	Wednesday	Thursday	Friday
<b>1</b>	<b>2</b> General Social Survey: Social support and aging, 2002	<b>3</b> Industrial Product Price and Raw Materials Price Indexes, August 2003 Canadian Community Health Survey: Mental health and well-being, 2002	<b>4</b> Longitudinal Survey of Immigrants to Canada, 2001	<b>5</b> Labour Force Survey, August 2003 Canadian Forces supplement to the Canadian Community Health Survey: Mental health and well-being, 2002
<b>8</b> Building permits, July 2003 Field crop reporting series: Stocks of Canadian grain, July 31, 2003	<b>9</b> Performing arts, 2000/01	<b>10</b> New Housing Price Index, July 2003 Industrial capacity utilization rates, Q2 2003 Postsecondary Education Participation Survey, 2002	<b>11</b> Canadian international merchandise trade, July 2003	<b>12</b> Labour productivity, hourly compensation and unit labour cost, Q2 2003
<b>15</b> New motor vehicle sales, July 2003	<b>16</b> Monthly Survey of Manufacturing, July 2003 Family income and participation in postsecondary education, 1990 to 2000	<b>17</b>	<b>18</b> Canada's international transactions in securities, July 2003 Household Internet Use Survey, 2002	<b>19</b> Wholesale trade, July 2003
<b>22</b> Retail trade, July 2003 Deliveries of major grains, August 2003	<b>23</b> Consumer Price Index, August 2003	<b>24</b> Leading Indicators, August 2003 Travel between Canada and other countries, July 2003 Aboriginal Peoples Survey, 2001	<b>25</b> International investment position, Q2 2003 Employment, earnings and hours, July 2003 Electronic commerce: Household shopping on the Internet, 2002	<b>26</b> National balance sheet accounts, Q2 2003
<b>29</b> National tourism indicators, Q2 2003 Ethnic Diversity Survey, 2002	<b>30</b> Gross domestic product by industry, July 2003 Industrial Product Price and Raw Materials Price Indexes, August 2003 Employment Insurance, July 2003			