



Infommat

A Weekly Review

Friday, September 7, 2001

OVERVIEW

◆ Real gross domestic product posts slow growth in the second quarter

Real gross domestic product (GDP) edged up only 0.1% in the second quarter of 2001, posting its slowest rate of growth since the third quarter of 1995.

◆ Economic activity recedes

After a 0.3% gain in May, economic activity receded 0.2% in June. This was the economy's largest monthly decline in more than a year.

◆ Current account surplus remains robust

The current account surplus remained robust in the second quarter, reaching \$9.9 billion, even though it is a slowdown from an exceptional \$13.5 billion recorded in the first quarter.

◆ Prices for industrial products and raw materials decline

Influenced by falling petroleum and mineral fuel prices, both the Industrial Products Price Index and the Raw Materials Price Index declined from June to July 2001.

◆ Corporate profits edge up

Corporate operating profits edged up 0.6% to \$44.7 billion in the second quarter of 2001, ending three consecutive quarterly declines.

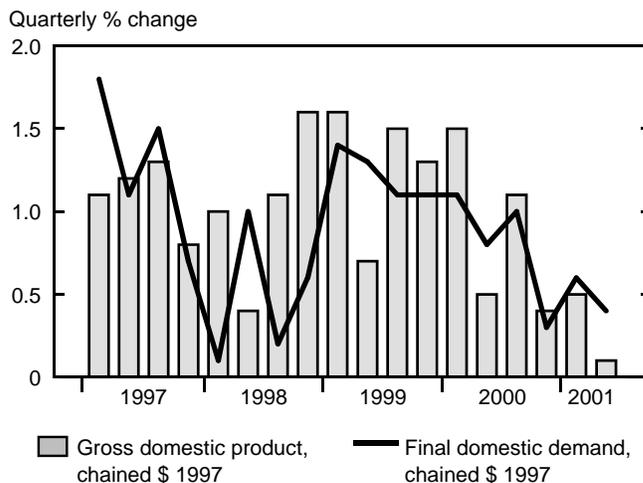
Real gross domestic product posts slow growth in the second quarter

Real gross domestic product (GDP) has posted its slowest rate of growth since the third quarter of 1995, edging up only 0.1% in the second quarter of 2001. This is a slowdown from the 0.5% increase in the first quarter.

GDP growth has averaged 0.5% over the past four quarters, after averaging 1.2% over the preceding four quarters. Several factors led to this slow growth, notably decreased spending by consumers and a slowdown of investment in housing.

Consumer spending decelerated to 0.3% growth in the second quarter. Expenditure on many commodities changed little. Much of Canada enjoyed a mild spring, and expenditures on natural gas and other fuels dropped. Gasoline purchases were reduced, reflecting higher prices during the second quarter. Transportation expenditures fell 1.8% as a result of a transit strike in British Columbia and weakness in air transportation. Residential investment remained virtually unchanged in the second quarter, after three quarters of strong growth.

Gross domestic product and domestic demand



(continued on page 2)



... Real gross domestic product posts slow growth in the second quarter

Personal disposable income edged down (in nominal terms), the first quarterly decline since 1996. Incomes were pulled down by a drop in federal transfers, which fell back to the level last witnessed in the fourth quarter of 2000. However, incomes increased in the first quarter, in the wake of a \$1.5 billion payout for the relief of heating expenses during that same quarter. Labour income slowed sharply to 0.5% growth, following a two-year period of increases averaging more than 1.0%.

Business investment rose 0.7%, but businesses continued to reduce their expenditures on computers and other related equipment. After three quarters of decline, investment by businesses in non-residential structures and equipment increased moderately. Business spending on automobiles jumped 11.3%, and business investment in software grew 6.1%, continuing a period of increases of over three years. Conversely, business investment in computers and other office equipment dropped 7.5%, the third quarter of decline following a series of strong increases. Investment in industrial machinery declined 2.4%.

After falling in the first quarter, business investment in inventories resumed, but at levels lower than in the previous year. Trade industries reduced their levels of inventory, while those of manufacturers increased. Retail inventories of motor vehicles fell

\$1.9 billion, after greater decreases in the previous two quarters.

Corporate profits, stated on a nominal basis, fell 1.6%—the first fall in three years. Exports fell 0.8% in the second quarter, following declines in the previous two quarters. This marks the first occurrence of three consecutive declines since 1991. Machinery and equipment exports dropped 6.0% after falling 4.6% in the previous quarter—the largest back-to-back decline in 18 years. The export of telecommunications equipment was the major contributor to this weakness. Partly offsetting the drop in machinery and equipment exports, automotive exports jumped 6.9% as sales rebounded in U.S. markets.

As for net government expenditure on goods and services, this was up 0.8%, following a similar increase in the first quarter. Government spending on a national accounts basis has increased modestly for each quarter over the past four years. All levels of government were in surplus positions in the second quarter. The combined net lending by all levels of government exceeded \$40.0 billion on a seasonally adjusted basis, expressed at annual rates.

*The second quarter 2001 issue of **National Income and Expenditure Accounts, quarterly estimates** (Internet: 13-001-XIB, \$33/\$109; paper: 13-001-XPB, \$44/\$145) will be available soon. For more information, contact the information officer (613-951-3640), Income and Expenditure Accounts Division.*

Economic activity recedes

Economic activity receded 0.2% in June, after advancing 0.3% in May. This was the economy's largest monthly decline in more than a year. Weaknesses in manufacturing, mining and public sector services were the source of the decline.

Total factory output fell 1.0% in June, after a 0.7% increase in May, the result of deeper cuts to production by manufacturers of electronic products. In June, the output of electronic products fell 5.8%, continuing the pattern of steep declines that was interrupted in May. Manufacturers of telecommunications equipment showed the largest decline (-14.3%), bringing levels down 50% since November 2000. Production of computers and peripherals, of fibre optic equipment, and of electronic parts and components also fell substantially. Inventories of electrical and electronic products continued to accumulate in producers' warehouses, indicating that further cuts to production may be in store. Relative to sales, the finished product inventories of these manufacturers were at their highest level in a decade.

Production of paper and allied products slipped 2.9% in June, the seventh downward movement in 10 months. Slumping demand for pulp and newsprint from the slowing United States economy was largely to blame. Production of sawn lumber fell 3.4% in June. The softwood lumber dispute with the United States led many Canadian sawmills to halt or slow production of lumber.

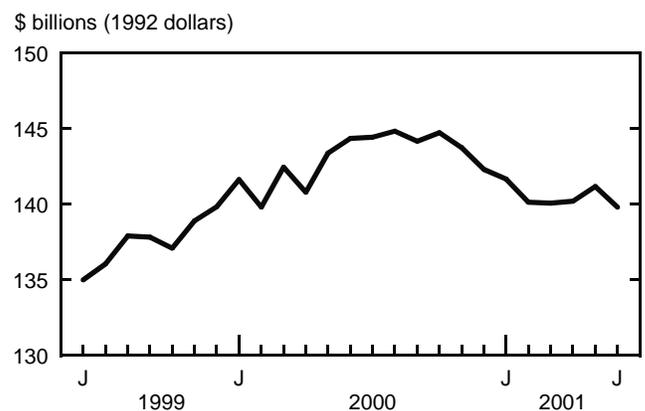
Output in the mining sector tumbled 2.6% in June, following a 2.3% decline in May. A second substantial decline in drilling and rigging activity accounted for most of the drop, as production in this industry fell back to more normal levels from a weather-induced spike in April. Production of crude petroleum also declined for the third consecutive month, mainly because unscheduled shutdowns occurred at major facilities.

The economic slowdown in June spared neither the automotive sector (where output of automotive products edged back 0.4%),

Note to readers

Monthly GDP by industry is valued at 1992 prices. The estimates presented here are seasonally adjusted at annual rates. The next annual revision of monthly GDP by industry estimates, scheduled for release on September 28, will include major classification and conceptual changes. For more information, consult the Statistical methods page on Statistics Canada's Web site (www.statcan.ca).

Manufacturing output



nor the financial services industries (where activity fell 0.4%), nor wholesale trade (where demand for computers continued to falter). These decreases were only partly offset by gains in aircraft, chemicals and plastics manufacturing, as well as in communications services, which continued to enjoy steady growth.

(continued on page 3)

... Economic activity recedes

Output in the aircraft industry continued to expand in June, as producers filled orders for commuter aircraft. Chemical production rose 0.8% after two months of decline. Output in the communications industries rose 1.0% in June, extending the strong upward momentum that has seen this industry maintain double-digit levels of annual growth during the past two years. Telephone carriers continued to be this industry group's main source of growth, as consumer demand for long distance and cellular telephone services continued to grow.

Output of public sector services fell back 0.3% in June, as a result of a new wave of strike activity in Saskatchewan, British Columbia and Nova Scotia. Federal government services activity returned to April levels in June, as the canvassing work of 37,000 2001 Census temporary hires was completed by the end of May.

*The June 2001 issue of **Gross domestic product by industry** (Internet: 15-001-XIE, \$11/\$110) will be available soon. To purchase data, contact Yolande Chantigny (1-800-887-4623; imad@statcan.ca). For more information, contact Richard Evans (613-951-9145; evanric@statcan.ca) Industry Measures and Analysis Division.*

Current account surplus remains robust

The seasonally adjusted current account surplus reached \$9.9 billion in the second quarter, a robust performance even though it is a slowdown from an exceptional \$13.5 billion recorded in the first quarter. A reduction in the surplus of goods, among others, led to this slowdown.

Although it remained high, Canada's surplus in goods eased back to \$18.7 billion from the record \$21.6 billion posted in the first quarter. Exports declined for the first time in more than four years, whereas imports rose marginally.

Export revenues for natural gas and electricity, which drove the recent gains in the merchandise surplus, dropped in the second quarter, following a decline both in price and volume. A further large decline in exports of telecommunications and related products also contributed to the quarterly decline. However, these decreases were partly offset by the auto sector, which rebounded after declines in the previous four quarters. Agricultural products and lumber also posted gains, and imports of automotive goods advanced sharply, after having also declined for four quarters.

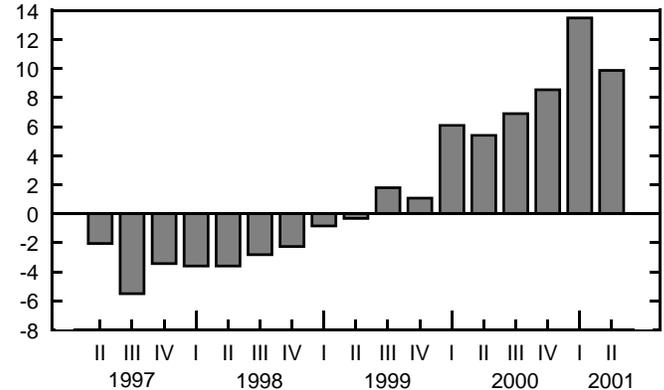
Canada's deficit on investment income grew by a moderate \$0.5 billion to \$7.6 billion in the second quarter. Most of the rise occurred because returns to foreign direct investment in Canada grew faster than the returns to Canadian direct investment abroad. However, the deficit on services narrowed from \$1.9 to \$1.6 billion in the second quarter. This came primarily from transportation services, where lower payments for passenger fares to foreign carriers led to a smaller deficit.

In the capital and financial account (not seasonally adjusted), Canadian direct investors substantially increased their outlays abroad, and Canadian portfolio investors continued to buy foreign equities at a pace similar to that of the first quarter. Canadian direct investment abroad rebounded to \$18.3 billion in the second quarter, approaching highs reached in 2000. The investment in the quarter came largely from infusions of capital to existing affiliates, although acquisitions continued to be a factor. Investment in foreign equities was \$12.4 billion in the second quarter, a result similar to that of the first. Canadian investors' holdings of foreign bonds were virtually unchanged.

Foreign direct investment in Canada rebounded dramatically from a first quarter low, chiefly the result of acquisitions of Canadian firms. Foreign portfolio investors increased their holdings of Canadian bonds and stocks for a second straight quarter. The

Current account balance

\$ billions, seasonally adjusted



\$14.2-billion investment was nearly triple that of the first quarter, and originated primarily from American and British investors. Canadian corporations have dramatically increased their financing in foreign markets in 2001. In the first six months, new debt raised in foreign markets has exceeded \$24.0 billion, compared with 1998's annual high of just over \$26.0 billion.

Foreign investors bought \$7.4 billion worth of Canadian securities in the second quarter to add to an even higher investment in the first. They bought a further \$6.2 billion of Canadian bonds, roughly split between existing bonds and the net acquisition of new issues less retirements. A further \$10.6 billion in corporate bonds were bought by foreign investors, a second straight quarterly record, while foreign holdings of government bonds declined by an additional \$4.4 billion, as Canadian governments continued to pay down their debt.

Canada's official reserve assets changed little in the second quarter, after a \$2.5 billion investment in the first quarter. At the same time, the Canadian dollar regained some of what it lost to the U.S. dollar in the first quarter, and continued to rise against other major foreign currencies. It closed the second quarter at 66 U.S. cents.

*The second quarter 2001 issue of **Canada's balance of international payments** (Internet: 67-001-XIB, \$29/\$93; paper: 67-001-XPB, \$38/\$124) will be available soon. For more information, contact Arthur Ridgeway (613-951-8907), Balance of Payments Division.*

Prices for industrial products and raw materials decline

The annual rate of growth in industrial product prices continued to slow in July. Manufacturers' prices, as measured by the Industrial Product Price Index (IPPI), have been decelerating since April. The IPPI grew 0.9% from July 2000 to July 2001, following a 1.6% year-over-year gain in June. On a month-to-month basis, the IPPI slipped 0.6% from June to July 2001.

Price increases for motor vehicles, lumber, chemicals and chemical products and meat products were the major contributors to the annual rise in manufacturers' prices. If the impact of a 6.8%

Industrial product and raw materials price indexes, July 2001

	Index (1992=100)	% change, previous month	% change, previous year
Industrial Product Price Index (IPPI)	128.9	-0.6	0.9
IPPI excluding petroleum and coal products	127.4	0.0	1.6
Intermediate goods	129.0	-0.8	0.0
Finished goods	128.8	-0.2	2.5
Raw materials Price Index (RMPI)	138.9	-1.7	-2.0
RMPI excluding mineral fuels	120.9	-0.3	-1.0
Mineral fuels (crude oil)	178.0	-3.7	-3.7
Vegetable products	122.0	1.9	9.1
Animals and animal products	125.4	-0.1	6.2
Wood	127.9	-0.5	-9.2
Ferrous materials	115.0	0.6	-3.0
Non-ferrous metals	105.8	-2.6	-9.5
Non-metallic minerals	123.1	0.6	1.1

drop in the prices of petroleum and coal products were excluded, the IPPI would have risen 1.6% instead of 0.9%.

From June to July, the value of the U.S. dollar strengthened against the Canadian dollar, pushing up prices of commodities quoted in U.S. dollars, notably automobiles. If the exchange rate had not changed, the IPPI would have declined 0.9% instead of 0.6%. The influence of the dollar was also evident on a 12-month basis. The IPPI rose 0.9% from July 2000 to July 2001, but without the exchange rate effect it would have edged down 0.2%.

As for raw materials, manufacturers paid 2.0% less in July 2001 than in July 2000. July's decline in the Raw Materials Price Index (RMPI) was mostly caused by lower prices for mineral fuels, along with decreases for wood products and non-ferrous metals. On a monthly basis, the RMPI was down 1.7% from June. Mineral fuels contributed to most of the decline in the Raw Materials Price Index in July. If mineral fuels were excluded, the RMPI would have fallen 1.0% in July (from July 2000), instead of the 2.0% drop recorded.

Input goods prices were unchanged in July compared with July 2000. On a monthly basis, intermediate goods prices in July were down 0.8% from June. Lower prices for paper and paper products, primary metals products, petroleum products and lumber were major contributors to this decrease.

Finished goods prices edged down 0.2% from June to July, with lower prices for petroleum products offset by higher prices for motor vehicles. Rising prices for motor vehicles pushed year-over-year prices up for finished goods. Higher prices for tobacco products and paper and paper products also contributed to the 2.5% increase from July 2000.

*The July 2001 issue of **Industry price indexes** (paper: 62-011-XPB, \$22/\$217) will be available soon. For more information, contact the Client Services Unit (613-951-9606; fax: 613-951-1539; infounit@statcan.ca) or Danielle Gouin (613-951-3375; danielle.gouin@statcan.ca), Prices Division.*

Corporate profits edge up

Corporate operating profits edged up 0.6% in the second quarter of 2001, ending three consecutive quarterly declines. Corporations earned \$44.7 billion in profits, up from \$44.4 billion in the first quarter—but well below the peak of \$50.4 billion earned in the second quarter of 2000. Of the 24 broad industry groups, 18 reported higher second quarter profits, led by funds and other financial vehicles, depository credit intermediaries and utilities.

The operating profit margin edged up to 8.4% in the second quarter from 8.3% in the first. Nonetheless, margins remained well below the average of 9.5% earned throughout 2000. The return on equity of corporations rose to 6.3% from 5.8% in the first quarter. The after-tax profits of financial industries more than doubled, to \$6.3 billion in the second quarter, led by gains in the funds industry. The non-financial industries' return on equity fell to 8.2% in the second quarter from 8.9% in the previous.

The financial group of industries had a resounding 18.9% quarter-to-quarter gain in operating profits, recovering much of the ground lost with the previous quarter's 25.9% profit slide. The profit rise was concentrated in the investment funds and

Note to readers

*These quarterly financial statistics cover the activities of non-government corporations in Canada. **Operating profits** include estimates for funds (except pension funds) and some capital gains of the financial industries, both of which are excluded from corporate profits as reported through the National Economic and Financial Accounts.*

banks. Operating profits of funds and other financial vehicles jumped from \$3.0 billion in the first quarter to \$4.3 billion in the second. The depository credit intermediaries (banks and credit unions) earned \$4.3 billion in second quarter operating profits, an increase of more than 10.1% over the first quarter. Despite the positive report for the group, the operating profits of credit unions slipped 12.6% to \$0.4 billion.

The non-financial group of industries suffered a 4.7% slide in second quarter operating profits, the third straight quarter of decline. Profits fell to \$32.9 billion. Oil and natural gas producers were the hardest hit, as their profits, moderated by falling prices, fell from the record high earned in the first quarter. Manufacturers

(continued on page 5)

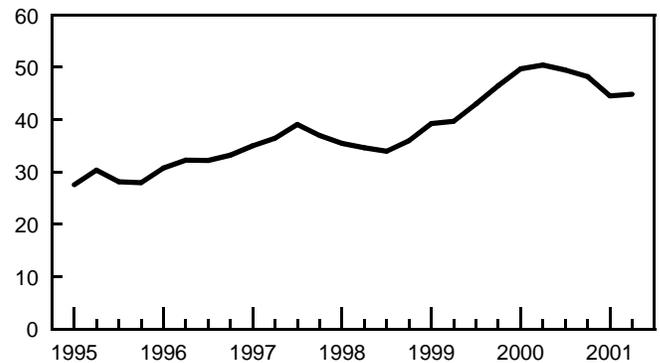
... Corporate profits edge up

turned in \$9.7 billion in second quarter operating profits, a slide of 10.4% from the first quarter, as the sector remained mired in a prolonged slump, particularly in the high-tech field. Operating profits of utility companies (electricity and natural gas), however, surged nearly 69,9% in the second quarter, despite lower operating revenue.

The primary metals industry trimmed quarterly operating profits to \$0.2 billion, nearly 42.9% below first quarter levels and a fraction of the \$0.7 billion earned in the same period of 2000. The steel industry has been hammered by high fuel costs and slow demand, particularly from the automotive sector. Operating profits of the motor vehicles and part manufacturing industry were unchanged from the first quarter at \$1.7 billion. Operating revenue

Corporate operating profits (quarterly)

\$ billions, seasonally adjusted



Financial statistics for enterprises

Seasonally adjusted

	Q2 2000	Q1 2001	Q2 2001	Q1 2001 to Q2 2001 % change
	\$ billions			
All industries				
Operating revenue	515.6	535.0	531.9	-0.6
Operating profit	50.4	44.4	44.7	0.6
Non-financial industries				
Operating revenue	455.3	478.2	474.5	-0.8
Operating profit	35.1	34.5	32.9	-4.7
Financial industries				
Operating revenue	60.3	56.8	57.4	1.1
Operating profit	15.3	9.9	11.8	18.9

totaled \$31.5 billion for the second straight quarter, possibly stabilized by upbeat domestic and U.S. automotive demand.

The wood and paper manufacturing industry edged from \$1.4 billion in the first quarter down to \$1.3 billion. Operating revenues were essentially flat at \$17.8 billion. Retailers, meanwhile, enjoyed a buoyant second quarter, with five of the seven retail groups posting increases in revenue and profits. Operating profits rose 4.9% to \$2.2 billion.

Quarterly financial statistics for enterprises (Internet: 61-008-XIE, \$26/\$86) will be available soon. For more information, contact Jeannine D'Angelo (613-951-2604), Client Services. For analytical information, contact Bill Potter (613-951-2662; potbill@statcan.ca) or Jean-Pierre Simard (613-951-0741; jpsimard@statcan.ca), Industrial Organization and Finance Division.

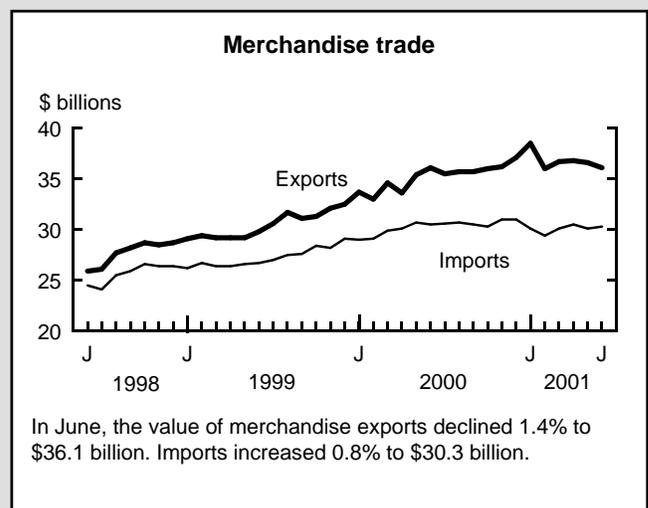
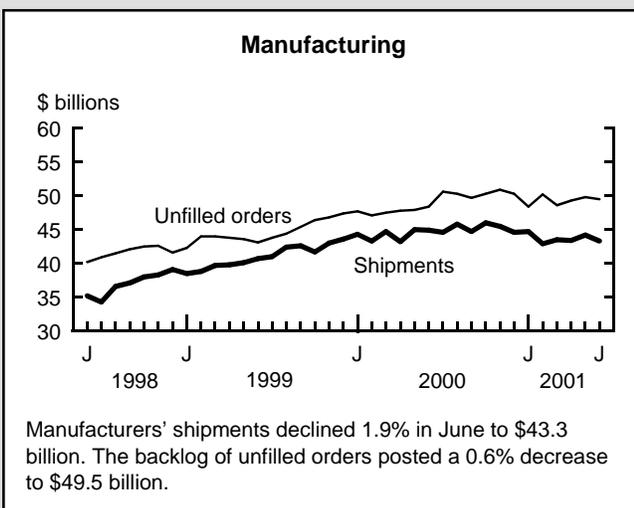
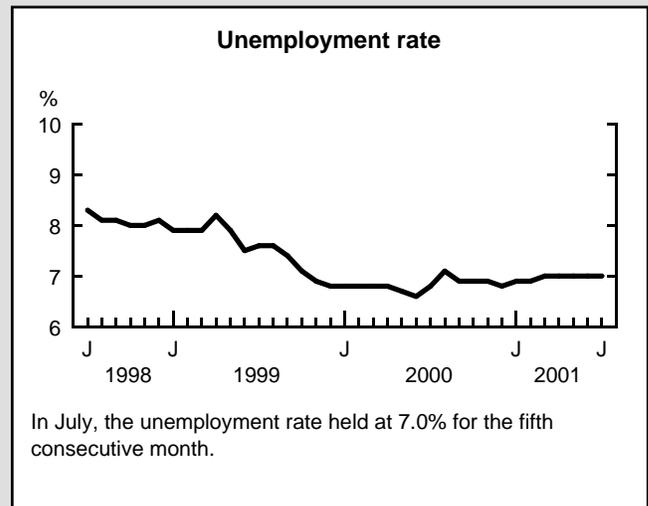
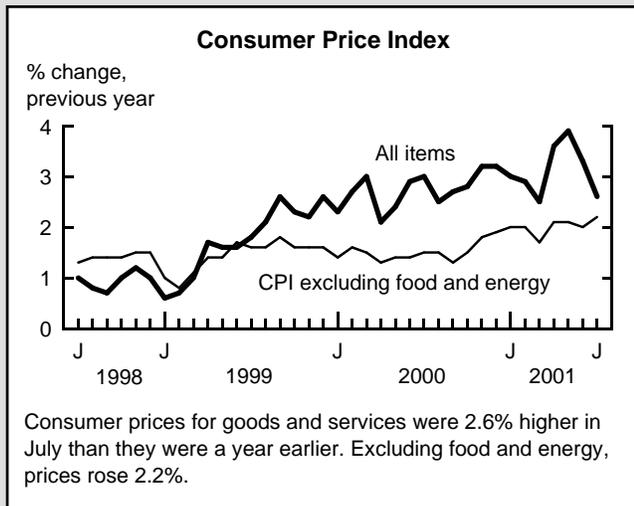
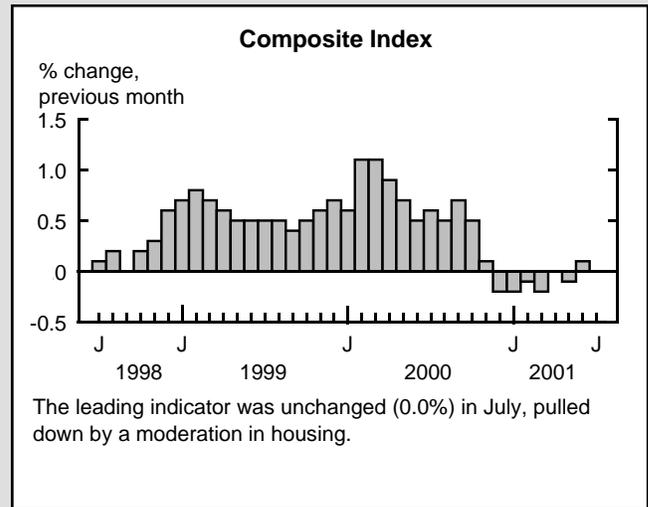
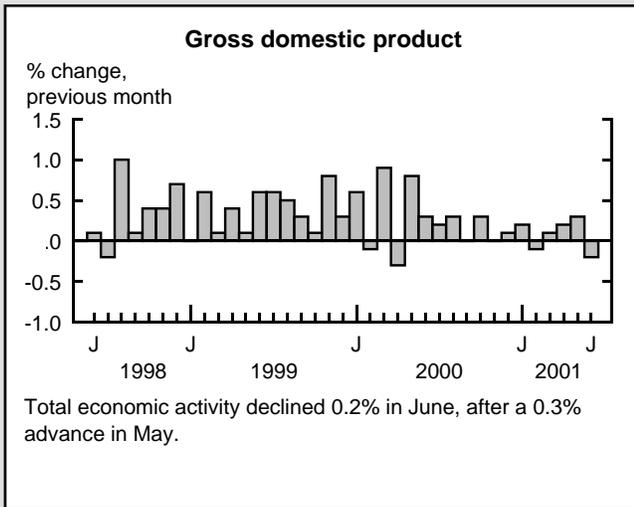
New from Statistics Canada

Women in Canada: Work chapter updates

The entry of large numbers of women into the paid workforce has been one of the dominant social trends in Canada over the last half century. That is one of the key findings in *Women in Canada 2000*, the latest edition of Statistics Canada's seminal series of reports on gender trends in Canada.

Women in Canada: Work chapter updates (Internet: 89F0133XIE, free) is now available. For more information, contact Colin Lindsay (613-951-2603; fax: 613-951-0387; lindcol@statcan.ca), Housing, Family and Social Statistics 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 (\$ billions, 1992)	June*	797.6	-0.2%	1.2%
Composite Index (1992=100)	July	166.2	0.0%	1.1%
Operating profits of enterprises (\$ billions)	Q2 2001	44.7	0.6%	-11.3%
Capacity utilization rate (%)	Q1 2001	84.1	-1.0†	-1.5†
DOMESTIC DEMAND				
Retail trade (\$ billions)	June	24.2	-0.3%	5.2%
Department store sales (\$ billions)	July*	1.72	3.3%	8.7%
New motor vehicle sales (thousands of units)	June	133.8	1.5%	0.0%
Wholesale trade (\$ billions)	June	32.9	0.2%	2.8%
LABOUR				
Employment (millions)	July	15.08	-0.1%	1.4%
Unemployment rate (%)	July	7.0	0.0†	0.2†
Participation rate (%)	July	65.8	-0.2†	0.1†
Average weekly earnings (\$)	June	661.38	0.2%	1.3%
Help-wanted Index (1996=100)	August*	153	-1.3%	-12.6%
INTERNATIONAL TRADE				
Merchandise exports (\$ billions)	June	36.1	-1.4%	-0.1%
Merchandise imports (\$ billions)	June	30.3	0.8%	-0.6%
Merchandise trade balance (all figures in \$ billions)	June	5.8	-0.7	0.2
MANUFACTURING				
Shipments (\$ billions)	June	43.3	-1.9%	-3.4%
New orders (\$ billions)	June	43.1	-3.7%	-5.1%
Unfilled orders (\$ billions)	June	49.5	-0.6%	2.3%
Inventory/shipments ratio	June	1.51	0.03	0.13
PRICES				
Consumer Price Index (1992=100)	July	117.1	-0.3%	2.6%
Industrial Product Price Index (1992=100)	July	128.9	-0.6%	0.9%
Raw Materials Price Index (1992=100)	July	138.9	-1.7%	-2.0%
New Housing Price Index (1992=100)	June	106.0	0.3%	2.9%

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

* new this week

† percentage point

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A weekly review

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Published by the Official Release Unit, Communications Division,
Statistics Canada, 10th floor, R.H. Coats Bldg., Ottawa, Ontario, K1A 0T6.

Price per issue: paper, \$4; online at www.statcan.ca, \$3. Annual subscription:
paper, \$145; online, \$109. All prices are in Canadian dollars and exclude
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Products released from August 29 to September 5, 2001

SUBJECT AREA Title of product	Period	Catalogue number	Price (\$) (issue/subscription)
AGRICULTURE			
Rural and small town Canada analysis bulletin, Vol. 3, no. 2	1901-1996	21-006-XIE	free
Stocks of frozen meat products	August 2001	23-009-XIE	free
DISTRIBUTIVE TRADES			
Retail trade	June 2001	63-005-XPB	21/206
HOUSING, FAMILY AND SOCIAL STATISTICS			
Women in Canada: Work chapter updates	August 2001	89F0133XIE	free
INCOME AND EXPENDITURE ACCOUNTS			
Estimates of labour income, monthly estimates	June 2001	13F0016DDB	125/500
Estimates of labour income, monthly estimates, tables and analytical document	June 2001	13F0016XPB	20/65
Financial flow accounts, quarterly estimates	Q2 2001	13-014-DDB	300/1200
Financial flow accounts, quarterly estimates, tables and analytical document	Q2 2001	13-014-PPB	50/180
Income and expenditure accounts, quarterly estimates	Q2 2001	13-001-DDB	125/500
Income and expenditure accounts, quarterly estimates, tables and analytical document	Q2 2001	13-001-PPB	50/180
INCOME STATISTICS			
Spending patterns in Canada	1999	62-202-XIE	34
Survey of financial security: Methodology for estimating the value of employer pension plan benefits	2001	13F0026MIE01003	free
INTERNATIONAL TRADE			
Imports by country	January-June 2001	65-006-XMB	62/206
Imports by country	January-June 2001	65-006-XPB	124/412
MANUFACTURING, CONSTRUCTION AND ENERGY			
Electric lamps, light bulbs and tubes	July 2001	43-009-XIB	5/47
Sawmills and planing mills	June 2001	35-003-XIB	9/86
Steel wire and specified wire products	June 2001	41-006-XIB	5/47
SCIENCE, INNOVATION AND ELECTRONIC INFORMATION			
Household Internet Use Survey	2000	56M0002XCB	2000
TRANSPORTATION			
Canadian Vehicle Survey	2000	53-223-XIE	free

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