



# Infommat

*A Weekly Review*

Friday, September 29, 2000

## OVERVIEW

### ◆ Exports and imports both fall back

In July, the value of exports fell 2.9% and the value of imports slipped 0.4%, as both retreated from the record highs reached in recent months. Canadian companies exported fewer passenger vehicles and less communications equipment, and imported fewer auto parts.

### ◆ Retailers regain considerable strength

Retail sales have regained considerable strength, advancing in both May and June and growing 1.3% in July. All the retail sectors contributed to the sales growth in July, most notably furniture, general merchandise and automotive.

### ◆ Wholesalers post third straight advance

Wholesale sales increased for a third straight month in July (+0.6%), despite a sharp decline in the motor vehicle, parts and accessories trade group.

### ◆ Canadian investors keep buying foreign stocks

In July, Canadian investors accumulated \$3.2 billion worth of foreign securities, as they showed no sign of easing their demand for foreign stocks. At the same time, foreign investment in Canadian securities slipped marginally, though Americans were buyers of Canadian technology shares.

### ◆ Tuition fees up, but rate of increase slows

For the 2000/01 academic year, undergraduate arts students are paying on average 3.0% more in tuition. This increase is smaller than in previous years, as more provinces have frozen tuition. Law and music students are seeing the largest fee increases.

## Exports and imports both fall back

The value of exports and imports both dropped in July, retreating from the record highs reached in recent months. Canadian companies exported fewer passenger vehicles and less communications equipment, and imported fewer auto parts. Exports dropped 2.9%, or \$1.0 billion, down to \$34.5 billion. Imports slipped 0.4% to \$30.3 billion.

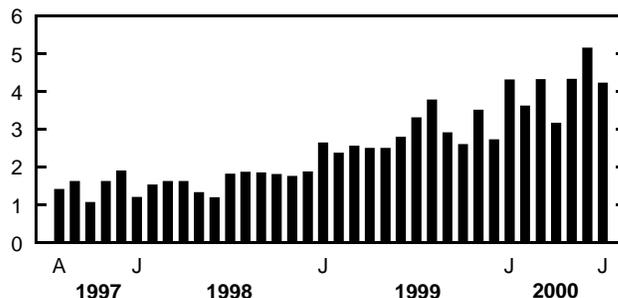
The merchandise trade surplus declined by \$924 million from June to July, falling to \$4.2 billion. However, for the first seven months of this year, the trade surplus totalled \$28.9 billion—ahead of the same period last year by \$10.4 billion.

The major contributors to July's lower exports were passenger vehicles, communications equipment and crude oil. Exports of motor vehicle products were off 4.5%. The biggest decline in July was in passenger vehicles, down \$294 million (-7.1%). After reaching record levels in June, exports of auto parts dropped 9.4%. Truck exports, however, were up 11.0%. Exports of communications equipment, which had been rising since January 1999, dropped 12.8% in July to \$1.9 billion because of a temporary slowdown in demand from the United States during the summer holiday period.

Energy exports, after setting records in June, declined 7.3% in July. Crude oil exports plunged 14.2%, owing mainly to lower export prices. Electricity exports also diminished, but were still up 59.4% over July 1999. Natural gas exports climbed 7.0%, an increase entirely linked to prices, which continued to follow the

### Merchandise trade balance

\$ billions, seasonally adjusted



(continued on page 2)



### ... Exports and imports both fall back

rising trend that started at the beginning of this year. Forestry exports, meanwhile, remained stable in July. Lower lumber exports were entirely offset by higher exports of wood pulp and paper.

Imports were down slightly in July, mainly because of declines for motor vehicle parts, industrial machinery used in the auto industry and metal fabricated basic products. Imports of motor vehicle products fell 2.5%. Production of some models declined, dragging imports of parts down 4.8%. Truck imports dropped 10.7%, as demand for heavy trucks slowed. Car imports, however, climbed 6.4%; most of the increase was made up of cars from Mexico.

Lower imports of metal fabricated basic products, mainly copper slug to be turned into coins, pushed imports of industrial goods down 2.5%. Imports of steel bars, rods and plates were

down 14.0% to \$416 million in July. However, imports over the first seven months of 2000 were \$3.2 billion, an increase of \$1.1 billion over the same period of 1999.

These declines were offset somewhat by higher imports of communications and computer equipment, which continued for a fifth consecutive month, as well as by increased imports of airplanes and parts.

*The July 2000 issue of Canadian international merchandise trade (print: 65-001-XPB, \$19/\$188; online at [www.statcan.ca](http://www.statcan.ca): 65-001-XIB, \$14/\$141) includes tables by commodity and country. Current account data are available quarterly in Canada's balance of international payments (print: 67-001-XPB, \$38/\$124; online: 67-001-XIB, \$29/\$93). For further information, contact Jocelyne Elibani (613-951-9647 or 1 800 294-5583), International Trade Division. See also "Current trends" on page 7.*

## Retailers regain considerable strength

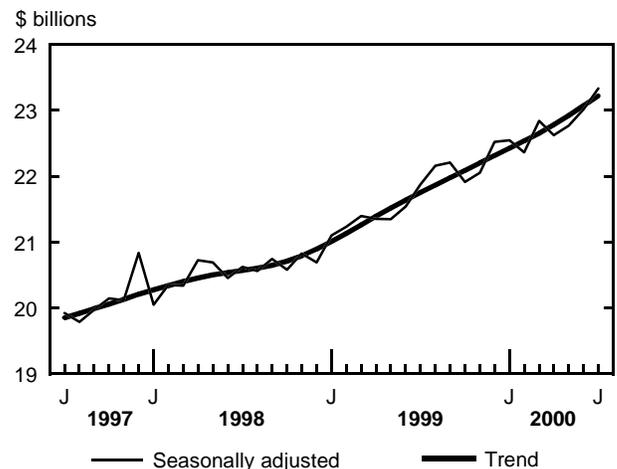
Retail sales advanced for a third consecutive month in July to total \$23.3 billion, up 1.3% from June. This followed gains of 1.1% in June and 0.6% in May. In constant dollars, retail sales were up in July by 1.4%. Lower prices for motor vehicles in July partly offset higher prices observed in most of the other retail sectors. Despite a weaker performance at the beginning of 2000, retailers have generally seen strong sales since the fall of 1998.

All the retail sectors contributed to the sales growth in July; the strongest gains were in the furniture, general merchandise and automotive sectors. Left behind in June (-0.8%), furniture store sales bounced back in July with a 2.0% gain. That was enough to re-ignite the strong upward sales trend seen in the furniture sector

**Retail sales, July 2000**  
Seasonally adjusted

	\$ millions	% change, previous month	% change, previous year
<b>Canada</b>	<b>23,328</b>	<b>1.3</b>	<b>6.7</b>
Newfoundland	377	0.2	7.8
Prince Edward Island	104	1.3	6.1
Nova Scotia	726	1.4	7.3
New Brunswick	577	0.1	4.0
Quebec	5,377	2.5	6.1
Ontario	8,943	1.2	6.8
Manitoba	797	2.4	6.7
Saskatchewan	687	0.4	5.8
Alberta	2,697	1.6	9.6
British Columbia	2,967	0.0	5.3
Yukon	28	-3.2	1.2
Northwest Territories	32	4.0	4.0
Nunavut	15	-2.2	3.8

### Retail sales



since the spring of 1996. Furniture and household appliances account for approximately 40% of all sales in the furniture sector, while home electronics and computers account for 30%.

At general merchandise stores, sales advanced for a fourth consecutive month in July (+1.9%). Within this sector, sales rose at department stores (+2.7%) and at other general merchandise stores (+0.9%). Department store sales have been climbing strongly since early spring, following a period of decline that began in September 1999, when the industry restructured. At the other general merchandise stores, sales have been generally rising since early 1997.

The automotive sector's retailers posted their third consecutive monthly sales gain in July (+1.7%). Motor and recreational vehicle dealers, who represent by far the largest branch of the automotive sector, posted sales growth of 1.9%. These dealers saw volatile results in the first four months of this year, and then gains in May, June and July. They have made extensive use of

(continued on page 3)

### ... Retailers regain considerable strength

attractive financing offers and large cash rebates since the start of 2000.

Consumers also rushed into food stores (+1.0%) and clothing stores (+0.8%) in July. July marked the second consecutive monthly advance for food stores and the third straight gain for clothing stores.

The largest retail sales growth in July occurred in Quebec and Manitoba. In Quebec, sales advanced in most retail sectors in both June and July, following weaker gains in the first five months of the year. In Manitoba, the strength in July came largely from higher sales in the automotive sector. This sector was also mostly responsible for the smaller sales gains seen in Manitoba since the start of 2000.

Healthy sales increases were also posted in July in Alberta, Nova Scotia, Prince Edward Island and Ontario. In Alberta, a strong economy has been fuelling retail sales since the spring of 1999. In Ontario, advances in May, June and July added strength to the upward movement seen in retail sales since the summer of 1996.

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

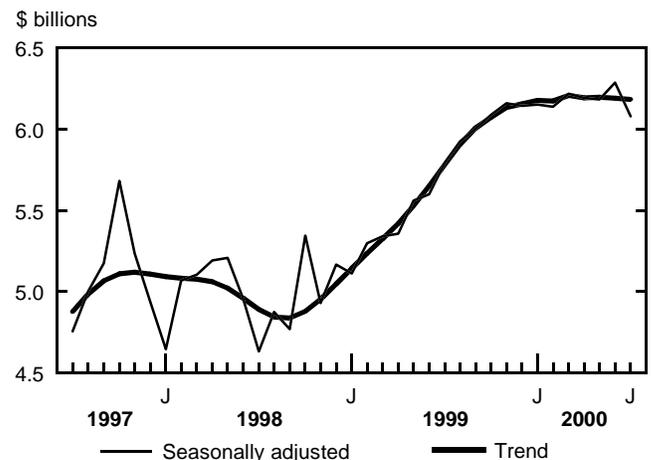
## Wholesalers post third straight advance

Wholesale sales increased for a third straight month in July, rising 0.6% to \$32.3 billion. July's increase followed a marginal 0.4% rise in June and a 1.6% gain in May. Wholesale sales have been generally climbing since mid-1998.

In July, sales increased in only 5 of 11 trade groups, but that was more than enough to offset declines in the other six, the largest of which was a drop in motor vehicles, parts and accessories. Wholesalers in Ontario, who accounted for about half of total national sales, bore the brunt of the declines.

Sales of motor vehicles, parts and accessories fell a sharp 3.3%. Since this trade group accounts for around one-fifth of total wholesale sales, this notable decline dampened the overall increase in July. However, sales of "other products" and computer and

### Wholesale sales of motor vehicles, parts and accessories



### Wholesale trade, July 2000

Seasonally adjusted

	\$ millions	% change, previous month	% change, previous year
<b>Canada</b>	<b>32,333</b>	<b>0.6</b>	<b>8.1</b>
Newfoundland	222	0.9	1.2
Prince Edward Island	53	2.1	11.6
Nova Scotia	571	0.4	5.8
New Brunswick	416	2.3	12.3
Quebec	6,646	2.1	8.6
Ontario	16,197	-0.6	8.6
Manitoba	860	-0.3	-5.1
Saskatchewan	898	0.8	4.8
Alberta	3,194	4.1	19.0
British Columbia	3,251	0.3	0.5
Yukon	10	9.1	10.2
Northwest Territories	13	11.5	6.3
Nunavut	2	1.8	31.7

electronic components were still strong. "Other products" wholesalers turned in a 4.0% sales gain, their seventh consecutive, spurred on by continuing healthy demand in both Canada and elsewhere. Wholesalers of computers, packaged software and other electronic machinery saw sales jump 2.8%, their fourth consecutive monthly rise. Their sales have been climbing since the start of 2000.

In addition, wholesalers of industrial and other machinery, equipment and supplies reported a 1.7% gain, sales of farm machinery, equipment and supplies rose 1.6% and food product sales advanced 2.8%.

Wholesale sales rose in all provinces except Ontario and Manitoba. Ontario's sales results were hurt by lower sales of motor vehicles and parts. Nevertheless, wholesale sales in Ontario were 8.6% higher than in July 1999. Manitoba's decline came on the heels of June's fall of 3.9%. Wholesalers in Manitoba have seen their sales fluctuate over the last several years, and sales have fallen since early this year.

(continued on page 4)

### ... Wholesalers post third straight advance

In Quebec, wholesalers were able to offset the effect of lower wholesale sales of motor vehicle, parts and accessories. Wholesale sales in Quebec have been generally rising for the last number of years except when they levelled off between late 1997 and mid-1998. Alberta's wholesalers reported strong sales in July, a performance that can be attributed to strong sales of industrial machines, chemicals and "other products."

Inventories held by wholesalers remained at June levels, unchanged in value at \$42.7 billion. Inventory values have generally risen over the last several years. However, that general increase has started to moderate since the start of 2000. The

ongoing global shortage of electronic components was evident again in July, as wholesalers of computers, packaged software and other electronic machinery reported a drop in inventories (-4.8%). The inventory-to-sales ratio fell from 1.33 in June to 1.32 in July. The ratio has levelled off since late 1999.

The July 2000 issue of **Wholesale trade** (online at [www.statcan.ca](http://www.statcan.ca): 63-008-XIB, \$14/\$140) presents the full report. To order data, or for general information, contact Client Services (1 877 421-3067 or 613-951-3549; [wholesaleinfo@statcan.ca](mailto:wholesaleinfo@statcan.ca)). For further analytical information, contact Alexander Hays (613-951-3552; [haysale@statcan.ca](mailto:haysale@statcan.ca)), Distributive Trades Division.

## Canadian investors keep buying foreign stocks

In July, Canadian investors continued to accumulate foreign securities, increasing their holdings by \$3.2 billion. Investors were net buyers of both foreign stocks and foreign bonds. In just the first seven months of this year, Canadians' investment in foreign securities totalled \$32.7 billion—nearly \$10 billion higher than any previous annual accumulation.

Canadian investors showed no sign in July of easing their demand for foreign stocks, adding a further \$2.8 billion. This brought their investment in foreign stocks so far this year to \$30.8 billion, which far surpasses any previous year's annual total. In July, Canadian investors favoured U.S. stocks by a three-to-one margin over overseas equities. Year-to-date, however, they have evenly split their purchases between the two markets. As for foreign bonds, after divesting some in June, Canadian investors returned as buyers in July. The investment went entirely to U.S. treasuries. Year-to-date, their investment in foreign bonds came to nearly \$2 billion.

Foreign investment in Canadian securities slipped marginally in July. Purchases of stocks were more than offset by sales of debt instruments. Foreign investors acquired a more modest \$2.2 billion worth of Canadian equities. That was well below the record \$10 billion seen in June, when large issues of new shares of Canadian companies were exchanged in the acquisition of foreign companies. American investors accounted for all the foreign buying of Canadian shares in July. The major portion was directed to technology shares.

The amount of Canadian bonds held by foreign investors fell a further \$1.6 billion in July, for a year-to-date total sell-off of \$13.6 billion. Foreign investors did purchase \$1.0 billion worth of new and outstanding Canadian bonds in July, but that was more than offset by retirements. Since most governments are posting surpluses, new issues of bonds in foreign markets are down by more than \$11 billion from January to July 1999, and retirements are up by almost \$8 billion. As for Canadian money market paper, foreign investors cut their holdings for a third consecutive month in July (-\$1.1 billion). American and European investors continued to reduce their holdings.

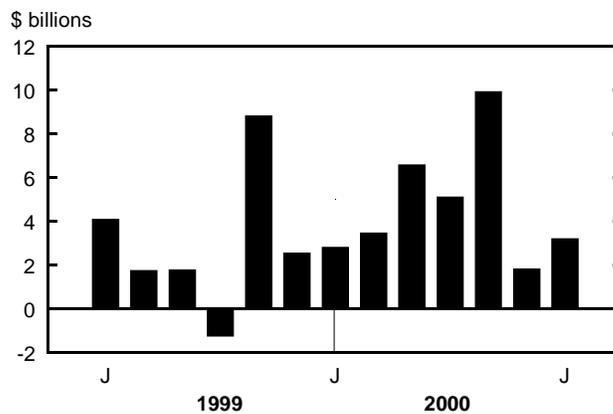
### Related market information

The interest rate differential between Canada and the United States on short-term government paper rose 10 basis points to 40 basis points by the end of July, favouring investment in the United States. For four consecutive months, the differential has fluctuated in the 20- to 40-point range. On long-term government bonds, the differential also favours investment in the United States. It shrank by about 10 basis points to sit at 25 basis points at the end of July.

The TSE 300 composite index added to the strong 10.2% gain in June by rising 2.1% in July. These advances again exceeded the performance of Standard & Poor's 500 index, which gained 2.4% in June and lost 1.6% in July.

The dollar, after gaining almost three-quarters of a cent against the U.S. dollar in June, declined nearly three-tenths of a cent in July.

### Canadian investment in foreign securities<sup>1</sup>



<sup>1</sup> Includes bonds and stocks.

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

## Tuition fees up, but rate of increase slows

This fall, undergraduate arts students will pay on average \$3,380 in tuition, up 3.0% from 1999/00 and more than double the average tuition at the beginning of the 1990s. However, more provinces have frozen tuition, so that 3.0% increase represents a significant slowing of the average annual increase, which has been nearly 9% during the last five years.

Tuition fees have been frozen this fall at universities in Newfoundland, Prince Edward Island and in British Columbia (at public institutions only) for a sixth consecutive year. At universities in Quebec, fees are frozen for a fourth year for Quebec residents, but students from other provinces attending Quebec universities face a 7.8% increase in tuition. Manitoba students are receiving a 10% rebate from the provincial government for 2000/01.

The highest average increase this year is in Saskatchewan (+7.7%). However, the highest average undergraduate arts fees in the country are in Nova Scotia, at \$4,408; Ontario universities follow with the nation's second highest. This fall's average 2.7% fee increase at Ontario universities is well below Ontario's average annual increase of 11.5% during the five previous years.

Tuition fees increased during the 1990s, as universities attempted to make up for cuts in government funding. Since 1990/91, undergraduate arts fees have more than doubled in all but three provinces. The largest increase occurred in Alberta, where fees more than tripled. The lowest undergraduate fees in Canada are still found in Quebec for residents of the province, who will continue to pay less than half the tuition fees of students in other provinces in virtually all fields of study. British Columbia now has the second-lowest average arts fees.

### Average tuition fees by field of study<sup>1</sup>

	1999/00	2000/01	1999/00 to 2000/01
	\$		% change
Agriculture	3,205	3,208	0.1
Architecture	3,347	3,318	-0.9
Arts	3,281	3,380	3.0
Commerce	3,125	3,264	4.4
Dentistry	7,244	7,678	6.0
Education	3,024	2,838	-6.2
Engineering	3,465	3,622	4.5
Household sciences	3,182	3,164	-0.6
Law	3,475	4,106	18.2
Medicine	5,646	5,975	5.8
Music	3,314	3,688	11.3
Science	3,252	3,360	3.3
Undergraduate	3,293	3,405	3.4
Graduate	3,522	3,961	12.5

<sup>1</sup> Weighted by the number of students.

### Average undergraduate arts tuition<sup>1</sup>

	1990/91	1999/00	2000/01	1990/91 to 2000/01	1999/00 to 2000/01
	\$			% change	
<b>Canada</b>	<b>1,496</b>	<b>3,281</b>	<b>3,380</b>	<b>125.9</b>	<b>3.0</b>
Newfoundland	1,344	3,300	3,300	145.5	0.0
Prince Edward Island	1,840	3,480	3,480	89.1	0.0
Nova Scotia	1,943	4,101	4,408	126.9	7.5
New Brunswick	1,898	3,329	3,519	85.4	5.7
Quebec <sup>2</sup>	902	1,868	1,898	110.4	1.6
Ontario	1,653	3,865	3,971	140.2	2.7
Manitoba	1,415	3,018	2,873	103.0	-4.8
Saskatchewan	1,526	3,164	3,409	123.4	7.7
Alberta	1,244	3,658	3,841	208.8	5.0
British Columbia <sup>3</sup>	1,727	2,470	2,520	45.9	2.0

<sup>1</sup> Weighted by the number of students.

<sup>2</sup> Includes fees for both in- and out-of-province students. The weighting was revised to reflect Quebec's differential fee policy. Hence, average tuition fees for Quebec and Canada have been revised for the years 1997/98 to 2000/01.

<sup>3</sup> Includes fees at both public and private institutions.

The two faculties with the largest fee increases for 2000/01 are law and music. Dentistry and medicine remain the most expensive programs in terms of average tuition. Average dentistry fees will be highest in Saskatchewan and Ontario. Tuition fees for medicine will be highest in Newfoundland and Ontario.

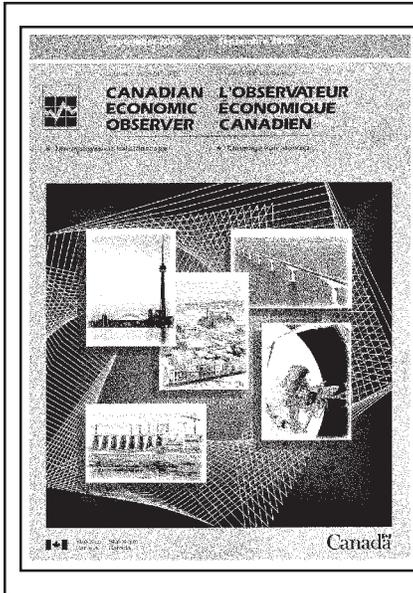
Graduate students will face higher average fee increases than undergraduates for a fourth consecutive year. In 2000/01, graduate students will pay an average \$3,961 in tuition, up 12.5% from the previous year. Since 1996/97, graduate tuition fees rise about 13% per year, compared with 8% a year for undergraduate fees. This year, graduate fee increases are largest in Nova Scotia, Ontario and Alberta.

As for foreign students, many public universities froze their tuition at the undergraduate and/or graduate level for the coming school year. The exceptions are Nova Scotia, New Brunswick, Ontario and Alberta, where fees for foreign students increased between 3% and 20%, depending on the institution and field of study.

Government funding to universities increased in 1998/99 for the first time since 1992/93. As a result, government grants and contracts accounted for 55% of total university revenue in 1998/99, unchanged from the previous year, following nearly two decades of steady decline from 74% in 1981/82. In 1998/99, tuition fees for credit courses made up 17% of university revenue, more than double the 8% share in 1981/82.

Information is available on university tuition fees, additional compulsory fees and the cost of accommodation on campus. To order tables, or for general information, contact Sharon-Anne Borde (613-951-1503; sharon.borde@statcan.ca). For further analytical information, contact Peter Elliott (613-951-4551; peter.elliott@statcan.ca), Centre for Education Statistics.

## New from Statistics Canada



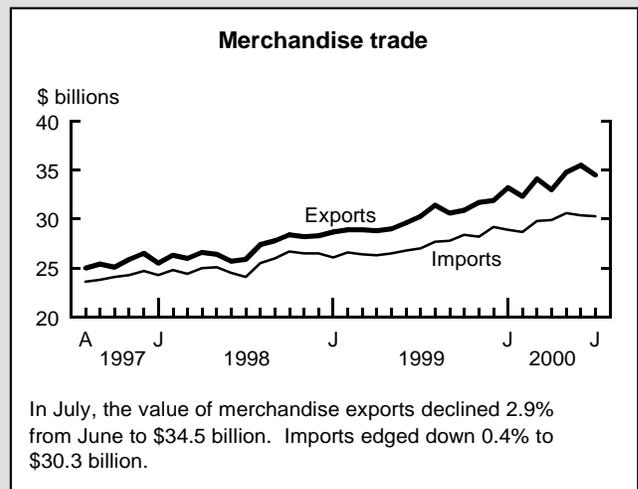
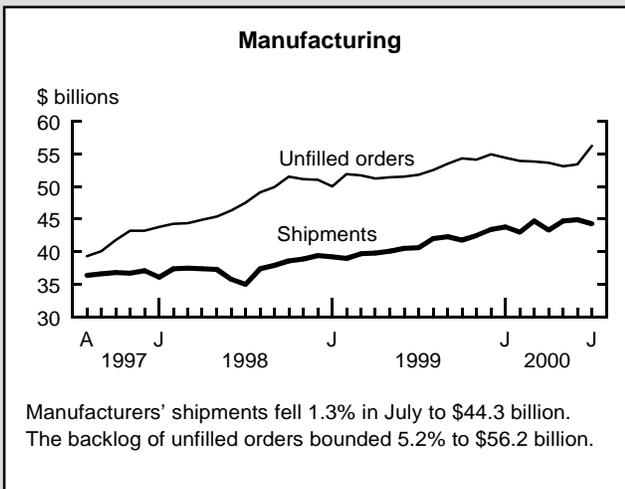
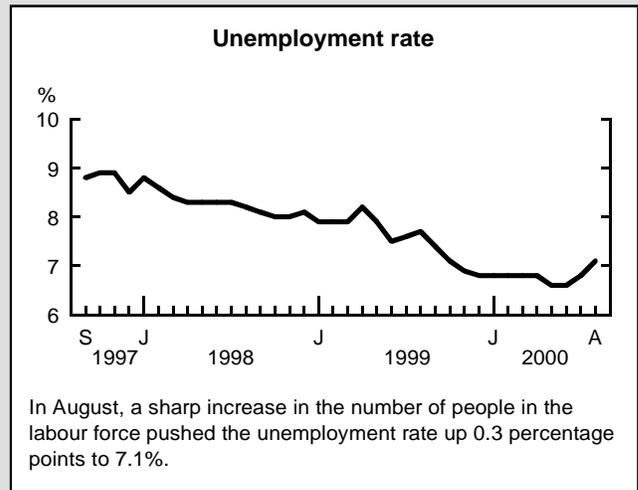
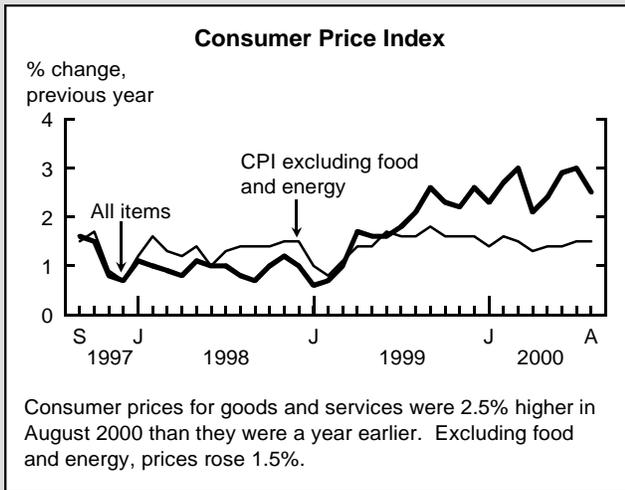
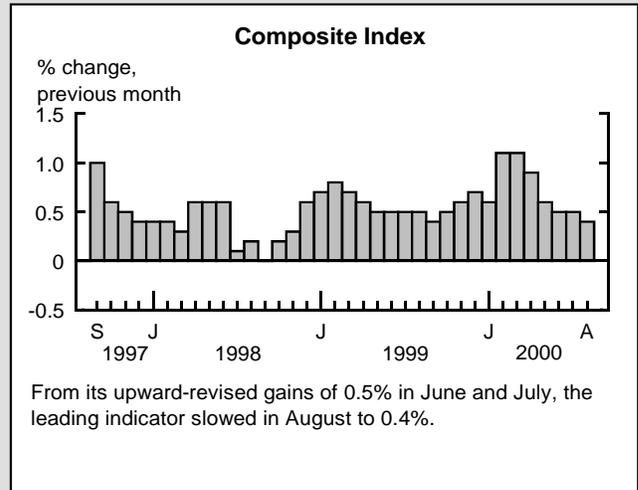
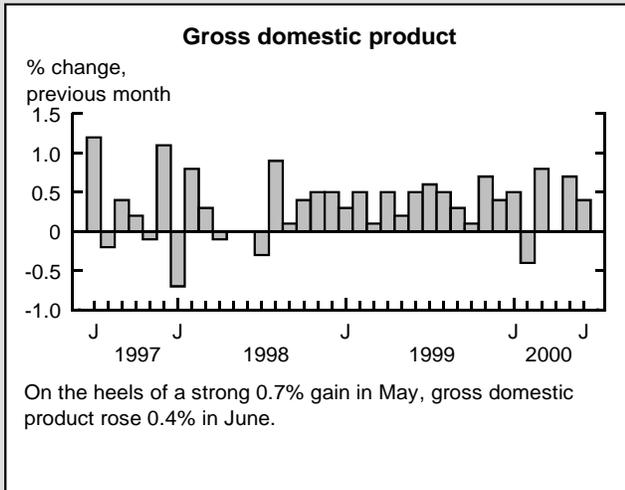
### Canadian economic observer September 2000

The September 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 August and presents a feature article on unemployment.

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 September 2000 issue of Canadian economic observer (11-010-XPB, \$23/\$227) is now available. For more information, contact Cyndi Bloskie (613-951-3634; ceo@statcan.ca), Current Economic Analysis Group.*

## 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)	June	783.3	0.4%	4.7%
Composite Index (1992=100)	August	164.8	0.4%	8.1%
Operating profits of enterprises (\$ billion)	Q2 2000	51.9	1.7%	21.6%
Capacity utilization (%)	Q2 2000	87.9	0.4†	4.1†
<b>DOMESTIC DEMAND</b>				
Retail trade (\$ billion)	July	23.3	1.3%	6.7%
Department store sales (\$ billions)	July	1.58	2.6%	1.9%
New motor vehicle sales (thousand of units)	July	131.9	-1.5%	0.8%
Wholesale trade (\$ billion)	July	32.3	0.6%	8.1%
<b>LABOUR</b>				
Employment (millions)	August	14.90	0.2%	2.4%
Unemployment rate (%)	August	7.1	0.3†	-0.6†
Participation rate (%)	August	65.9	0.3†	0.3†
Average weekly earnings (\$)	July*	627.49	0.4%	2.7%
Help-wanted Index (1996=100)	August	170	-0.6%	5.6%
<b>INTERNATIONAL TRADE</b>				
Merchandise exports (\$ billion)	July	34.5	-2.9%	13.9%
Merchandise imports (\$ billion)	July	30.3	-0.4%	12.2%
Merchandise trade balance (all figures in \$ billion)	July	4.2	-0.9	0.9
<b>MANUFACTURING</b>				
Shipments (\$ billion)	July	44.3	-1.3%	9.1%
New orders (\$ billion)	July	47.1	4.2%	14.9%
Unfilled orders (\$ billion)	July	56.2	5.2%	8.5%
Inventory/shipments ratio	July	1.34	0.04	0.04
<b>PRICES</b>				
Consumer Price Index (1992=100)	August	113.9	-0.2%	2.5%
Industrial Product Price Index (1992=100)	August*	127.8	0.2%	4.0%
Raw Materials Price Index (1992=100)	August*	144.3	2.1%	18.9%
New Housing Price Index (1992=100)	July	103.2	0.2%	2.4%

*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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## Products released from September 21 to 27, 2000

Subject area/Title of product	Period	Catalogue number	Price (\$) (issue/subscription)
<b>AGRICULTURE</b>			
VISTA on the Agri-food industry and the farm community	September 2000	21-004-XIE	no charge
<b>BALANCE OF PAYMENTS AND FINANCIAL FLOWS</b>			
Canada's balance of international payments	Q2 2000	67-001-XIB	29/93
Canada's balance of international payments	Q2 2000	67-001-XPB	38/124
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National directory of courts	August 2000	85-510-XIE	12
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<b>CURRENT ECONOMIC ANALYSIS</b>			
Canadian economic observer	September 2000	11-010-XPB	23/227
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Should the low-income cutoffs be updated? A summary of feedback on Statistics Canada's discussion paper	September 2000	75F0002MIE00011	no charge
<b>INTERNATIONAL TRADE</b>			
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Electric lamps, light bulbs and tubes	August 2000	43-009-XIB	5/47
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<b>SCIENCE, INNOVATION AND ELECTRONIC INFORMATION</b>			
Broadcasting and telecommunications service bulletin, vol. 30, no. 3: Private television broadcasters	1999	56-001-XIB	10/32

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Calendar of key releases: October 2000				
Monday	Tuesday	Wednesday	Thursday	Friday
2	3	4 Help-wanted index, September 2000	5 Building permits, August 2000	6 Labour force survey, September 2000 Crop production estimates, September 2000
9	10	11 New housing price index, August 2000 Labour force update: Hirings and separations, 1998/99*	12	13 New motor vehicles sales, August 2000
16 Movie theatres and drive-ins, 1998/99*	17 Travel between Canada and other countries, August 2000	18 Monthly survey of manufacturing, August 2000	19 Canadian international merchandise trade, August 2000 Wholesale trade, August 2000	20 Consumer price index, September 2000
23 Retail trade, August 2000	24 Canada's international transactions in securities, August 2000	25 Composite index, September 2000 Employment insurance, August 2000	26 Industrial product and raw materials price indexes, September 2000 Employment, earnings and hours, August 2000	27
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**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 Web site at [www.statcan.ca](http://www.statcan.ca).