



Infomat

A Weekly Review

Friday, October 5, 2001

OVERVIEW

◆ GDP slips for second straight month

Gross domestic product slipped 0.1% in July, after shrinking 0.2% in June. A decrease in manufacturing sector output again influenced the decline.

◆ Composite index holds steady

The leading indicator held steady for the second month in a row, after generally declining in the first half of 2001.

◆ Steady growth in industrial product prices

As in July, manufacturers' prices grew 0.9% in August, compared with a year earlier. Raw materials prices fell 4.5%.

◆ Average weekly earnings still rising

Average weekly earnings for all employees rose \$2.99 in July to \$665.41. The number of employees on payrolls fell by 13,700 in July from June.

◆ Canada's population surpasses 31 million

As of July 1, 2001, Canada's population was estimated at 31,081,900. Immigration was the main contributor to the 1.0% increase in the population.

◆ More people relocate to Toronto

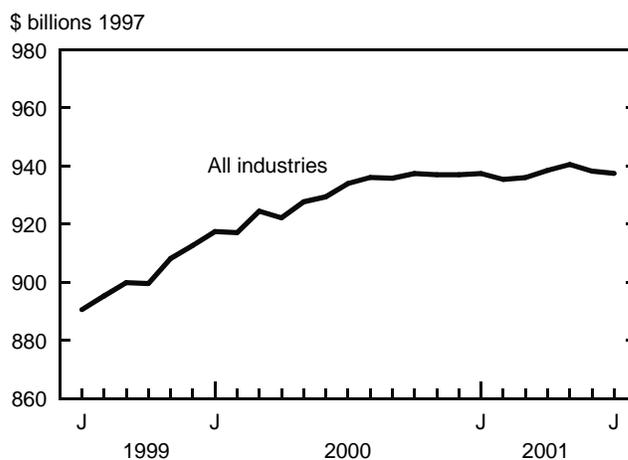
Toronto recorded the largest net inflow in migration of all census metropolitan areas between 1999 and 2000, followed by Vancouver and Montréal.

GDP slips for second straight month

Gross domestic product (GDP) slipped 0.1% in July, after declining 0.2% in June. Weakness in the economy was concentrated in manufacturing, which has been on a downward path since August 2000. Only 7 of the 21 major groups, accounting for 35.7% of output, managed to advance.

Output in the manufacturing sector declined 0.5% in July, on the heels of a 0.8% drop in June, as producers of electronic products continued to scale back production. Wood products manufacturing was also significantly lower in July. Declines in manufacturing, although widespread, were partly offset by makers of machinery and equipment, auto parts, fabricated metals, and petroleum refiners.

Gross domestic product



(continued on page 2)



... GDP slips for second straight month

Output in the computer and electronics industries fell 1.9%, the eleventh consecutive monthly decline. Production has declined 25.3% in 2001. Makers of communications equipment continued to suffer as production slid a further 3.0% in July. The output of telephone apparatus, the main component of this group, was reduced to 43% of August 2000 levels. A world-wide slump in this industry has taken its toll on producers of semiconductors and electronic components, where output fell 3.6%—the ninth decline in the past 12 months. Lower demand for fibre optic cable brought the output of the communications and wire and cable industry 2.9% lower. Computers and peripheral equipment manufacturing output edged up after four successive months of decline.

The forestry sector declined as manufacturers of wood products reduced output by 2.7%. In response, forestry and logging operations were cut back 3.9%. The lacklustre growth in housing starts in the last 12 months, a weak U.S. economy, and uncertainty in the wake of the expiration of the Softwood Lumber Agreement did not bode well for the industry. The slowdown in economic activity also lowered the demand for newsprint used in advertising. Additionally, the decline in manufacturing output reduced demand for packaging materials.

Notable declines in the manufacturing sector occurred in electric power generation and transmission, wholesale trade, and agricultural crop production. Other declines were noted in the chemical, food, furniture, non-metallic groups, and in iron and steel mills. Conversely, the mining and oil and gas sectors gave a needed boost to the economy in July (+1.8%) after two months of decline. Following unscheduled shutdowns at major oil refining facilities in June, oil and gas extraction increased 1.4% in July.

Note to readers

Beginning with the July 2001 data for gross domestic product (GDP) by industry, 1997 replaces 1992 as the base year used in determining prices. The data also reflect other major classification and conceptual changes. The 1997 North American Industrial Classification System (NAICS) replaces the 1980 Standard Industrial Classification (SIC), and valuation has been changed from factor cost to basic prices. For more information, consult Statistics Canada's website (www.statcan.ca). Follow the links Statistical methods, then New measure of Gross Domestic Product (GDP).

Drilling and rigging activity advanced modestly after two months of decline. Metal mining surged 8.2% as iron mining rebounded after an unexpected mine shutdown in June.

Information and cultural services were up 0.1% in July. The expansion of this sector of the economy in 2001 has been nowhere near the double-digit growth seen in 1999 and 2000. Professional, scientific and technical services also declined slightly in July.

*The July 2001 issue of **Gross domestic product by industry** (Internet: 15-001-XIE, \$11/\$110) will be available soon. A print-on-demand version is available at a different price. To purchase data, contact Yolande Chantigny (1-800-887-4623; imad@statcan.ca). For analytical information, contact Hans Messinger (613-951-3621; messhan@statcan.ca) or Jo Ann MacMillan (613-951-7248; macmjoa@statcan.ca), Industry Measures and Analysis Division. (See also "Current trends" on page 7.)*

Composite index holds steady

The leading indicator was flat in August for the second month in a row, after generally declining in the first half of 2001. Three of the four components that rose were related to household demand. Manufacturing continued to contract, as did business services.

The housing index returned to the positive trend shown most of the year. Housing starts rebounded in August, regaining most of the ground lost in July. The strength came from the construction of multiple units, for which vacancy rates are very low in several large cities. Spending on durable goods was restrained by the slack in incomes, as well as labour market conditions. Spending on furniture and appliances, and other durable goods, slowed further.

The weakness in the business sector worsened. For manufacturers, new orders continued to be dragged down by the collapse of demand for electronic products. Also pulled down were shipments, and their ratio to inventories, which was at its lowest level since 1993. The slack in business spending was reflected in a third straight drop for employment in business services, which was one of the pillars of growth in 2000. The stock market also continued to tumble.

The U.S. leading indicator posted a third straight gain (+0.2%). However, the sources of growth remained narrow, even before the impact of the terrorist attack in September. Industrial production fell 0.8% in August, the largest of 11 straight declines.

*For more information, consult the October 2001 issue of **Canadian economic observer** (paper: 11-010-XPB, \$23/\$227), or contact Francine Roy (613-951-3627), Current Economic Analysis Group. (See also "Current trends" on page 7.)*

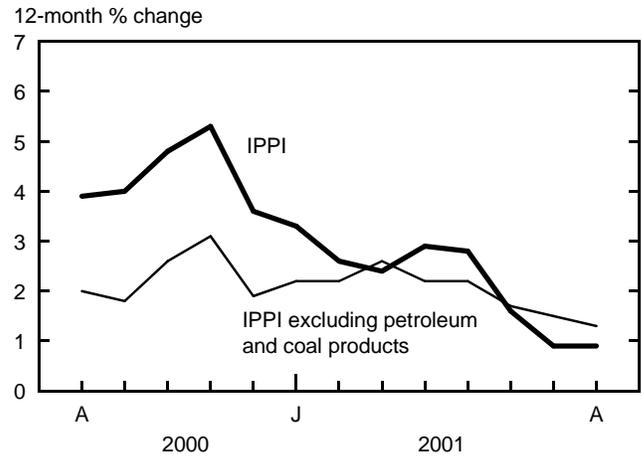
Steady growth in industrial product prices

Manufacturers' prices, as measured by the Industrial Product Price Index (IPPI), grew 0.9% from August 2000 to August 2001 after recording the same gain in July. Conversely, raw materials prices continued to decline, edging down 1.8% in July, and dropping 4.5% in August.

Petroleum and coal product prices declined 5.0% in August compared with August 2000. If petroleum and coal product prices were excluded, the IPPI would have gone up 1.3% instead of 0.9%. Price increases for motor vehicles, lumber and meat products were the major contributors to the annual rise in manufacturers' prices. Meanwhile, falling prices for primary metal products, pulp and petroleum and coal products partly offset the yearly increase. On a month-to-month basis, industrial prices were unchanged from July. Declining prices for primary metals, motor vehicles, and pulp and paper products offset higher prices for petroleum and coal products and lumber products.

Manufacturers paid 4.5% less for their raw materials in August than they did in August 2000. Mineral fuels were responsible for close to half the decline in the Raw Materials Price Index (RMPI) in August, along with decreases for wood products and non-ferrous metals. If mineral fuels were excluded, the RMPI would have declined 2.8% in August, on a year-over-year basis, instead of falling 4.5%. These decreases were somewhat offset by higher prices for animal and vegetable products. On a monthly basis, raw materials prices were down 0.3% from July. Lower prices for

Effect of petroleum product prices on IPPI



wood products, non-ferrous metals and animal products were partly offset by higher prices for mineral fuels.

Crude oil prices were 1.9% higher in August than in July, due to increasing demand. This increase influenced the IPPI; petroleum and coal product prices were up 2.6% from July. After two months of decline, lumber and other wood product prices rose 2.5% in August from July. Higher prices for softwood lumber were the major factor in this monthly increase. On an annual basis, prices for lumber and other wood products were up 11.2%.

Rising prices for motor vehicles pushed year-over-year prices up for finished goods (+2.6%). Prices for tobacco products and meat, fish and dairy products also contributed to this increase. On a monthly basis, prices for finished goods were virtually unchanged in August, rising just 0.1% from July. Higher prices for petroleum products were more than offset by lower prices for motor vehicles.

Producers of intermediate goods received 0.4% less for their goods in August compared with August 2000. Lower prices for pulp and paper products, primary metals products and petroleum products were the major contributors to this decline. These decreases were partially offset by higher prices for lumber, motor vehicles and chemical products. Prices for input goods were virtually unchanged in August, edging down 0.1% from July. Lower prices for pulp and paper products and primary metal products were offset by higher prices for lumber and petroleum products.

The August 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.

Industrial product and raw materials price indexes, August 2001

	Index (1992=100)	% change, previous month	% change, previous year
Industrial Product Price Index (IPPI)	128.8	0.0	0.9
IPPI excluding petroleum and coal products	127.0	-0.2	1.3
Intermediate goods	128.5	-0.1	-0.4
Finished goods	129.1	0.1	2.6
Raw materials Price Index (RMPI)	138.8	-0.3	-4.5
RMPI excluding mineral fuels	119.4	-1.7	-2.8
Mineral fuels (crude oil)	181.0	1.7	-6.7
Vegetable products	122.5	0.1	9.8
Animals and animal products	125.9	-0.9	6.0
Wood	123.9	-3.1	-12.8
Ferrous materials	114.7	-0.3	-3.0
Non-ferrous metals	101.7	-3.7	-14.0
Non-metallic minerals	123.1	0.0	1.2

Average weekly earnings still rising

Average weekly earnings for all employees rose \$2.99 in July to \$665.41. On a year-over-year basis, average weekly earnings were up 1.6% from July 2000, after increases in June (+1.4%) and May (+1.1%).

Average weekly earnings, all industries, July 2001 Seasonally adjusted

	\$	% change, previous month	% change, previous year
Canada	665.41	0.5	1.6
Newfoundland	599.18	0.0	1.0
Prince Edward Island	522.27	0.2	0.9
Nova Scotia	564.25	0.3	0.8
New Brunswick	592.64	0.8	1.1
Quebec	622.72	0.3	1.6
Ontario	712.17	0.4	1.6
Manitoba	598.46	0.6	1.2
Saskatchewan	597.81	1.0	1.6
Alberta	688.71	1.2	3.0
British Columbia	664.62	0.3	1.2
Yukon	755.54	0.8	0.0
Northwest Territories ¹	857.03	0.1	..
Nunavut ¹	778.67	0.7	..

¹ Data not seasonally adjusted.

.. Figures not available.

Note to readers

With the January 2001 data, the Survey of Employment, Payrolls and Hours began publishing its estimates based on the North American Industry Classification (NAICS). The NAICS-based estimates are not comparable to the previously published estimates based on the Standard Industrial Classification (SIC) of 1980.

In most provinces, average weekly earnings were slightly higher than in July 2000. The exception was Alberta, where earnings growth of 3.0% reflected strength in wholesale trade, health care and social assistance, accommodation and food services, and professional, scientific and technical services.

Average hourly earnings for hourly paid employees were \$16.89 in July, up 17 cents from June and up 1.4% from July 2000. Average weekly hours for hourly paid employees were down 0.1 to 31.3 hours compared with June, and average overtime hours were virtually unchanged.

The number of employees on payrolls fell by 13,700 in July from June. The largest employment losses were in wholesale trade (-6,100) and public administration, reflecting a further reduction of 3,000 census employees. Most provinces posted small employment losses.

Employment, earnings and hours (Internet: 72-002-XIB, \$24/\$240) will be available soon. For more information, contact Robert Frindt or Jean Leduc (1-866-873-8788; 613-951-4090; fax: 613-951-2869; labour@statcan.ca), Labour Statistics Division.

Canada's population surpasses 31 million

As of July 1, 2001, Canada's population was estimated at 31,081,900, an increase of 312,200 from July 1, 2000. The largest increase since 1996/97, the population grew by an estimated 1.0% in 2000/01, compared with increases of less than 0.9% during the previous three years.

Population estimates as of July 1

	2000	2001	% change, previous year
	Millions of people		
Canada	30,769,669	31,081,887	1.0
Newfoundland	537,221	533,761	-0.6
Prince Edward Island	138,065	138,514	0.3
Nova Scotia	941,199	942,691	0.2
New Brunswick	755,278	757,077	0.2
Quebec	7,377,654	7,410,504	0.4
Ontario	11,685,304	11,874,436	1.6
Manitoba	1,145,966	1,150,034	0.4
Saskatchewan	1,021,992	1,015,783	-0.6
Alberta	3,009,249	3,064,249	1.8
British Columbia	4,058,833	4,095,934	0.9
Yukon	30,582	29,885	-2.3
Northwest Territories	40,907	40,860	-0.1
Nunavut	27,419	28,159	2.7

Note to readers

Preliminary population estimates are for Canada, the provinces and the territories as of July 1, 2001. Population estimates for 1998, 1999 and 2000 are revised using birth, death and migration statistics when they become available. Revisions may result in notable changes for certain components, particularly for inter-provincial migration.

Non-permanent residents are those in Canada claiming refugee status or who hold a student authorization, employment authorization or minister's permit, plus their non-Canadian-born dependants.

More than 252,000 immigrants came to Canada in 2000/01, about 46,000 more than in 1999/2000. The number of non-permanent residents rose by 22,900 in 2000/01. On July 1, an estimated 287,700 non-permanent residents were living in Canada.

Ontario accounted for more than 60% of the nation's population growth from July 1, 2000 to July 1, 2001. Ontario's population was estimated at 11,874,400, a gain of about 189,100. The growth rate of 1.6% in 2000/01 was slightly higher than the 1.4% gain in 1999/2000. Ontario attracted 149,900 immigrants in 2000/01, about 33,100 more than in 1999/2000. Although Ontario's population accounted for less than 40% of the population of the country, almost 60% of all immigrants arriving in Canada settled there.

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... Canada's population surpasses 31 million

Among the provinces, Alberta, with an estimated population of 3,064,200, had the fastest rate of growth (+1.8%). Alberta had a net inflow of 25,700 people from inter-provincial migration in 2000/01, a slight increase over 1999/2000. Immigration increased as well, to 16,100 from 12,900.

British Columbia's population grew 0.9% to 4,095,900, a slightly faster pace than 0.8% in 1999/2000. This was the result of an increase in the number of immigrants, to 39,400 from 36,900. A combination of slight growth in immigration and inter-provincial migration pushed the population of Manitoba up to 1,150,000, a 0.4% increase compared with 0.3% in 1999/2000. Quebec's population reached an estimated 7,410,500, up 0.4%, having attracted 36,700 immigrants in 2000/01, about 6,400 more than in 1999/2000. New Brunswick's population increased 0.2% to 757,100, mainly the result of a lower net outflow to other provinces. Prince Edward Island's population increased 0.3%, about the same growth rate as in 1999/2000; Nova Scotia's rose 0.2%, also about the same.

Nunavut was the territory with the nation's highest population growth rate in 2000/01, rising to 2.7%. The territory's population was estimated at 28,200. Although the growth was mainly driven by high fertility rates, the territory also incurred a higher net inflow of people from other regions.

Two provinces and two territories recorded declines in population. Newfoundland's population declined 0.6% to 533,800, due to a large outflow of people to other parts of Canada. Saskatchewan's population declined 0.6% in 2000/01, compared with the 0.3% decline in 1999/2000. The decline was largely a result of an increase in net outflow to other provinces. Saskatchewan's population was estimated at 1,015,800. The population of Yukon declined 2.3%, while that of the Northwest Territories fell 0.1%.

More details are available in *Quarterly demographic statistics* (Internet: 91-002-XIB, \$8/\$25; paper: 91-002-XPB, \$10/\$33). To obtain data, contact Lise Champagne (613-951-2320; fax: 613-951-2307; lise.champagne@statcan.ca). For more information, contact Daniel Larrivée (613-951-0694; daniel.larrivee@statcan.ca), Demography Division.

More people relocate to Toronto

Nearly 1.3 million individuals moved between July 1, 1999 and June 30, 2000. This number includes those who relocated within their own province, those who moved from one province to another, and those who moved into or out of the country. Of these, an estimated 286,000 changed provinces and about 943,000 moved from one census division to another within their province. (A census division is similar to a county or regional municipality.)

Note to readers

These migration data were derived by comparing addresses supplied on personal income tax returns filed in the spring of 1999 and 2000. Adjusted to the June population estimates, they reflect intra-provincial moves between census metropolitan areas (CMAs) or census divisions (sub-provincial geographic areas such as counties, regional districts, and regional or district municipalities), as well as inter-provincial and international movements. Moves across town or across the street are excluded.

Migration, census metropolitan area, 1999/2000

	In	Out	Net migration	Net rate per 1,000 population	
				1998/99	1999/2000
Windsor	12,675	7,436	5,239	12.7	17.5
Calgary	50,301	35,111	15,190	18.6	16.4
Oshawa	16,958	12,293	4,665	10.7	15.9
Toronto	165,485	99,866	65,619	12.3	14.1
Kitchener	20,725	15,183	5,542	11.4	13.4
Ottawa-Hull	49,662	36,097	13,565	8.4	12.7
Vancouver	73,901	51,608	22,293	10.8	11.0
Edmonton	40,447	32,237	8,210	8.9	8.8
Hamilton	26,804	21,244	5,560	7.7	8.4
London	18,530	15,993	2,537	3.4	6.1
Halifax	15,544	13,671	1,873	5.4	5.3
St. Catharines-Niagara	11,439	9,465	1,974	2.5	5.1
Montréal	81,232	64,161	17,071	4.2	5.0
Sherbrooke	7,106	6,496	610	-0.3	4.0
Victoria	14,196	13,490	706	2.0	2.2
St. John's	6,020	5,781	239	-1.1	1.4
Québec	19,067	18,199	868	0.9	1.3
Winnipeg	20,452	19,956	496	0.1	0.7
Saint John	3,838	3,936	-98	-0.7	-0.8
Trois-Rivières	4,675	4,970	-295	-0.7	-2.1
Saskatoon	10,663	11,563	-900	0.7	-3.9
Regina	7,817	8,993	-1,176	-0.8	-5.9
Thunder Bay	3,807	4,938	-1,131	-6.1	-8.9
Sudbury	5,429	6,969	-1,540	-17.8	-9.7
Chicoutimi-Jonquière	3,445	5,158	-1,713	-5.6	-10.6

Between 1999 and 2000, the census metropolitan area (CMA) of Toronto received 165,485 people who chose to move there; during that same period of time, 99,866 people chose to leave. That resulted in a net inflow of 65,619 individuals, the largest of any CMA. This level was an increase from the net inflow of 56,607 from 1998 to 1999. Vancouver recorded the second largest net inflow, 22,293, and Montréal was third at 17,071.

Of those who moved into the Toronto CMA, 56% came from outside the country, and 28% came from elsewhere in Ontario. The remaining 16% came from all the other provinces combined. Of those who left Toronto, more than two-thirds went elsewhere in Ontario, and 13% left Canada. About 5% of the people who left Toronto went to British Columbia.

Relative to the size of the population of the CMA, Windsor had a net inflow of 17.5 people for every 1,000 people living there, the highest rate among CMAs. The Calgary CMA, which had the highest rate in 1998/99, was second with a net inflow of 16.4 migrants per 1,000. Of the 12,675 who moved to Windsor, 60% arrived from other areas of Ontario, 29% from outside the country, 3% from British Columbia and slightly less than 3% from Quebec.

Among census divisions, the Regional Municipality of York, just north of Toronto, had the largest net inflow from migration

(continued on page 6)

... More people relocate to Toronto

relative to the population already living there. From 1999 to 2000, York gained more than 53 people for every 1,000 already living there. From 1998 to 1999, York also showed the largest growth among census divisions; although large, the 1998/99 rate was only 39 persons per 1000 residents. At the same time, there were increasing numbers of persons moving into the census

divisions surrounding Toronto. From 1999 to 2000, this movement became even more pronounced, and more census divisions were affected by this growth from migration as it expanded even farther out from Toronto. The same phenomenon can be seen, though to a lesser extent, in the areas around Montréal and Calgary.

For more information, contact Client Services (613-951-9720; fax: 613-951-4745; saadinfo@statcan.ca), Small Area and Administrative Data Division.

New from Statistics Canada

Social Policy Simulation Database and Model 2001

The *Social policy simulation database and model (SPSD/M)*, Version 9.0, is based on 1997 microdata. The SPSD/M is a static microsimulation model. It comprises a database, a series of tax/transfer algorithms and models, analytical software and user documentation.

The SPSD/M is a tool designed to analyze the financial interactions of governments and individuals or families in Canada. It allows estimation of the income redistributive effects or cost implications of changes in the personal taxation and cash transfer system.

The Social policy simulation database and model, Version 9.0 (CD-ROM: 89F0002XCB, \$5,000/\$12,500) is now available. To order a copy, contact Dominique Paré (613-951-1782). For more information, contact Brian Murphy (613-951-3769; spsdm@statcan.ca), Social and Economic Studies Division.

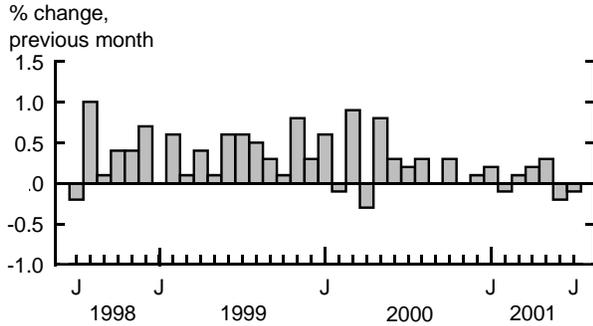
Innovation in Canadian manufacturing: Provincial estimates 2001

The working paper *Innovation in Canadian manufacturing: provincial estimates* is the second in a series that analyzes results from the 1999 Survey of Innovation and examines the characteristics of innovative firms in manufacturing at the provincial level. Included are descriptive statistics and statistical tables on percentages of innovative firms, and data on activities linked to innovation, research and development.

Innovation in Canadian manufacturing: Provincial estimates (Internet: 88F0006XIB01013, free) is now available. For more information, contact Susan Schaan (613-951-1953; susan.schaan@statcan.ca) Science, Innovation and Electronic Information Division.

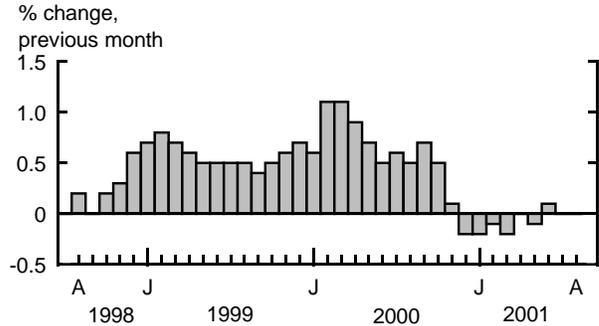
Current trends

Gross domestic product



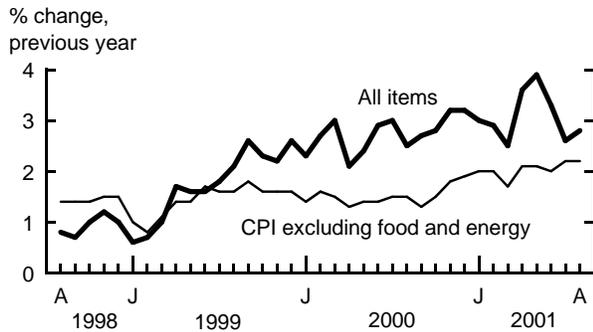
Total economic activity declined 0.1% in July, after a 0.2% reduction in June.

Composite Index



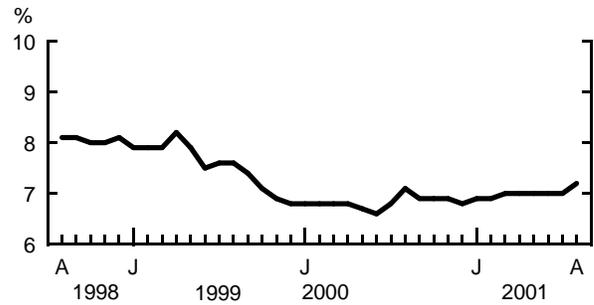
The leading indicator was unchanged (0.0%) in August, pulled down by further weakness in the business sector.

Consumer Price Index



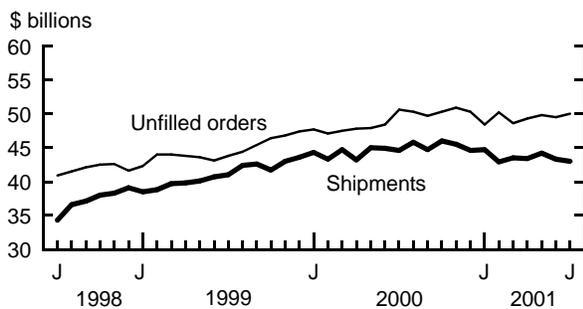
Consumer prices for goods and services were 2.8% higher in August than they were a year earlier. Excluding food and energy, prices rose 2.2%, unchanged from July.

Unemployment rate



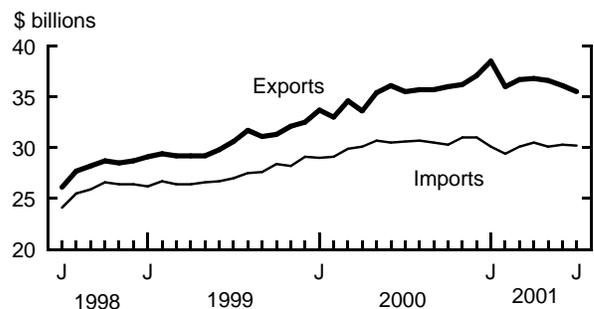
In August, the unemployment rate edged up to 7.2% as a result of a small drop in employment and an increase in labour force participation.

Manufacturing



Manufacturers' shipments declined 0.2% in July to \$43.0 billion. The backlog of unfilled orders posted a 1.2% increase to \$50.0 billion.

Merchandise trade



In July, the value of merchandise exports declined 0.4% to \$35.5 billion. Imports were unchanged at \$30.2 billion.

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

Latest statistics

	Period	Level	Change, previous period	Change, previous year
GENERAL				
Gross domestic product (\$ billions, 1997)	July*	937.4	-0.1%	0.4%
Composite Index (1992=100)	August	166.1	0.0%	0.5%
Operating profits of enterprises (\$ billions)	Q2 2001	44.7	0.6%	-11.3%
Capacity utilization rate (%)	Q2 2001	83.2	-0.4†	-2.6†
DOMESTIC DEMAND				
Retail trade (\$ billions)	July	24.1	-0.5%	3.4%
Department store sales (\$ billions)	July	1.72	3.3%	8.7%
New motor vehicle sales (thousands of units)	July	133.0	-0.5%	0.1%
Wholesale trade (\$ billions)	July	32.9	-0.4%	1.5%
LABOUR				
Employment (millions)	August	15.1	-0.1%	1.1%
Unemployment rate (%)	August	7.2	0.2†	0.1†
Participation rate (%)	August	65.9	0.1†	-0.1†
Average weekly earnings (\$)	July	665.41	0.5%	1.6%
Help-wanted Index (1996=100)	September*	148	-3.3%	-16.4%
INTERNATIONAL TRADE				
Merchandise exports (\$ billions)	July	35.5	-0.4%	0.2%
Merchandise imports (\$ billions)	July	30.2	0.0%	-1.3%
Merchandise trade balance (all figures in \$ billions)	July	5.4	-0.1	0.5
MANUFACTURING				
Shipments (\$ billions)	July	43.0	-0.2%	-3.5%
New orders (\$ billions)	July	43.6	1.7%	-6.8%
Unfilled orders (\$ billions)	July	50.0	1.2%	-1.3%
Inventory/shipments ratio	July	1.52	0.00	0.11
PRICES				
Consumer Price Index (1992=100)	August	117.1	0.0%	2.8%
Industrial Product Price Index (1992=100)	August*	128.8	0.0%	0.9%
Raw Materials Price Index (1992=100)	August*	138.8	-0.3%	-4.5%
New Housing Price Index (1992=100)	July	106.3	0.3%	3.0%

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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