

Monday, February 19, 2001 For release at 8:30 a.m.

MAJOR RELEASES

• **Monthly Survey of Manufacturing,** year 2000 and December 2000 Manufacturing shipments slipped 0.8% in December to \$45.1 billion. Substantial decreases in the motor vehicle and aircraft and parts industries were partly offset by a significant increase in the electrical and electronic products industry. For the year 2000, manufacturing shipments rose 9.2%, compared with gains of 9.3% in 1999 and 3.2% in 1998.

• Workplace and Employee Survey, 1999 Nearly one-quarter of all workplaces, accounting for more than one-third of paid employees, made a major investment in new computer technology in 1999. These investments were not associated with either higher employee layoff rates or slower employment growth, at least in the short run, but rather with a burst of computer-related training.

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MAJOR RELEASES

Monthly Survey of Manufacturing

Year 2000 and December 2000

Manufacturing shipments slipped 0.8% in December to \$45.1 billion. Substantial decreases in the motor vehicle and aircraft and parts industries were partially offset by a significant increase in the electrical and electronic products industry. For the year 2000, manufacturing shipments rose 9.2%, compared with gains of 9.3% in 1999 and 3.2% in 1998. The gains in 2000 and 1999 were the strongest seen by manufacturers since 1995, when shipments climbed 12.5%.

Both unfilled orders and new orders decreased in December: unfilled orders by 0.6% to \$55.0 billion, and new orders by 1.2%, the third decline in four months.

As 2000 drew to a close, the upward trend of manufacturers' shipments weakened, continuing the gradual softening that started in October 1999. Shipments decreased in 13 of the 22 major groups in December, representing 60% of total shipments, and six provinces reported lower monthly values.

The most recent Business Conditions Survey indicated that manufacturers were pessimistic about the coming quarter; 43% said their production would be lower during the January-to-March period. Manufacturers also stated concern that their current levels of finished product inventories were too high, and that their unfilled orders were lower than normal. The latest release of the Labour Force Survey showed that employment in the manufacturing sector was little changed in January, following gains in the preceding three months.

Shipments slipped as the motor vehicle industry weakened

The motor vehicle and aircraft and parts industries led the decrease among all industries in December. Shipments by motor vehicle manufacturers declined 6.1% in December to \$5.4 billion, the largest monthly drop since April. This was the lowest level of shipments since October 1998, and was in line with previously announced production cutbacks. In recent months, several motor vehicle manufacturers have stated their intention to curtail production in response to high retail inventories and lower-than-expected demand.

The aircraft and parts industry reported a 17.0% drop in December, returning to levels seen in the late summer. Manufacturers were working towards completing contracts in December.

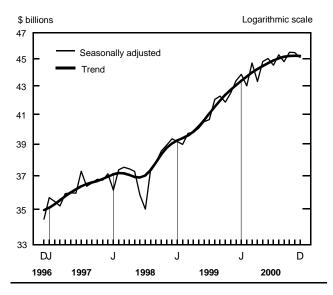
Note to readers

Unfilled orders are a stock of orders that will contribute to future shipments assuming that the orders are not cancelled.

New orders represent orders received whether shipped in the current month or not. They are measured as the sum of shipments for the current month plus the change in unfilled orders. Some people interpret new orders as orders that will lead to future demand. This is inappropriate, because the "new orders" variable includes orders that have already been shipped. Users should be aware that the month-to-month change in new orders may be volatile, particularly if the previous month's change in unfilled orders is large in relation to the current month's change.

Not all orders will be translated into Canadian factory shipments, because portions of large contracts can be subcontracted out to manufacturers in other countries.

Lower December shipments were also reported in the non-metallic mineral products (-9.7%) and primary metal (-3.2%) industries.



December shipments declined

Surpassing August's peak, the electrical and electronic products industry was the fastest-growing sector in December, up 7.8% to \$4.7 billion. December marked the quarter-end for several major establishments, resulting in the push to meet sales objectives.

The motor vehicle parts and accessories industry reported higher shipments in December,

recovering 5.7% from November's 26-month low, as some manufacturers rebounded from production shutdowns in November.

Shipments continued strong upward trend in 2000

For the year 2000, shipments increased in 19 of the 22 major groups, representing 97.4% of shipments.

The largest contributors to the increase were the electrical and electronic products (+32.8%), refined petroleum and coal (+55.2%), paper and allied products (+17.4%) and aircraft and parts (+25.9%) industries.

Electrical and electronic products led all industries in shipment growth in 2000, with significant expansion in the telecommunications equipment and electronic parts and components sectors. The electrical and electronic products industry hit \$48.8 billion, accounting for a 9.1% share of total manufacturing in 2000, up from 7.5% in 1999. Only the motor vehicle and food industries exceeded this level.

In conjunction with higher capacity, petroleum and coal product prices rose 25.3% in 2000, contributing to the overall increase in shipment values during the year. Similarly, a 12.0% rise in prices for pulp and paper products is partly responsible for the strong increase in paper and allied products shipments during the year.

The slowdown in the transportation sector in the latter half of 2000, pushed down motor vehicle shipments slightly (-0.9%) from 1999's peak of \$70.3 billion. Other marginal declines were reported in the shipbuilding and repair (-2.4%) and other manufacturing (-1.9%) industries.

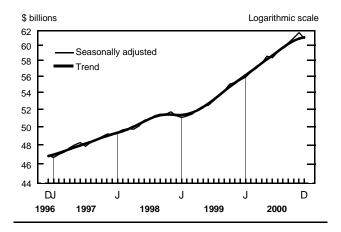
Shipments by province and the territories

	Nov.	Dec.	Nov.
	2000	2000	to
			Dec.
			2000
	seas	onally adjusted	
	\$ million	S	% change
Newfoundland	165	168	1.9
Prince Edward Island	88	83	-6.1
Nova Scotia	724	739	2.0
New Brunswick	916	944	3.1
Quebec	11,167	11,045	-1.1
Ontario	24,105	23,817	-1.2
Vanitoba	887	886	-0.1
Saskatchewan	627	618	-1.3
Alberta	3,594	3,622	0.8
British Columbia	3,170	3,155	-0.5
Yukon, Northwest			
Territories and			
Nunavut	5	6	6.5

Electrical and electronic products manufacturing draw down inventories

Manufacturers' inventories, which had been steadily rising throughout most of 2000, fell 1.3% to \$61.0 billion in December, the first decline in five months. December's decrease was concentrated in the goods-in-process inventories (-3.8%) and raw materials inventories (-1.0%).

Inventories fall for the first time since June

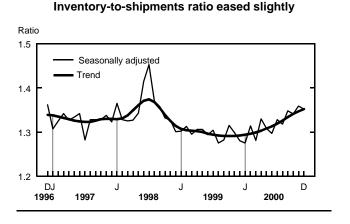


The largest decline in inventories was in the electrical and electronic products industry (-7.4%). Inventories, which had been climbing since 1998, dropped off in December as manufacturers' boosted their year-end sales, shipping from their finished product inventories.

Other sectors that reported lower inventories in December included refined petroleum and coal (-9.4%), aircraft and parts (-2.1%), and machinery (except electrical) (-4.1%).

The major offsetting movements occurred in the motor vehicle industry, which was up 9.8% overall, due to significantly higher finished product inventories.

The inventory-to-shipment ratio eased to 1.35 in December from November's 1.36. The lower ratio was the result of shipments declining at a slower pace than inventories. The trend in the inventory-to-shipment ratio had been edging up since early summer. The finished products-to-shipment ratio was also stable in December.



Orders continued to soften

Unfilled orders declined for the second consecutive month, edging down 0.6% to \$55.0 billion in December, the lowest level since June 2000.

Manufacturers in the machinery (excluding electrical) industry experienced the largest decline in orders, down 4.0% from November. At \$5.2 billion, this is the lowest level in two years. The electrical and electronic products industry was off 2.2%, the third decline in four months.



The aircraft and parts industry enjoyed higher unfilled orders for the second month, up 0.7% in December.

New orders fell 1.2% in December, owing to significant decreases in the motor vehicle, primary metal and aircraft and parts industries.

Available on CANSIM: matrices 9550-9555, 9558, 9559, 9562-9565, 9568-9579 and 9581-9595.

The December 2000 issue of the *Monthly Survey* of *Manufacturing* (31-001-XIB, \$15/\$147; 31-001-XPB, \$20/\$196) will be available soon. See *How to order products*.

Data for shipments by province in greater detail than normally published may be available on request. For more information, or to enquire about the concepts, methods or data quality of this release, contact Russell Kowaluk (613-951-0600; *kowarus*@*statcan.ca*), Manufacturing, Construction and Energy Division.

Shipments, inventories and orders in all manufacturing industries

	Shipme	ents	Invento	ries	Unfilled c	orders	New or	ders	Inventories-to shipment ratio
					seasonally	adjusted			
		%		%		%		%	
	\$ millions	change	\$ millions	change	\$ millions	change	\$ millions	change	
December 1999	43,359	2.0	55,520	0.6	54,938	1.6	44,227	4.6	1.2
January 2000	43,834	1.1	55,876	0.6	54,393	-1.0	43,288	-2.1	1.2
February 2000	43,003	-1.9	56,516	1.1	53,889	-0.9	42,500	-1.8	1.3
March 2000	44,666	3.9	57,238	1.3	53,844	-0.1	44,620	5.0	1.2
April 2000	43,310	-3.0	57,597	0.6	53,629	-0.4	43,096	-3.4	1.3
May 2000	44,776	3.4	58,562	1.7	53,135	-0.9	44,282	2.8	1.3
June 2000	45,002	0.5	58,347	-0.4	53,470	0.6	45,336	2.4	1.3
July 2000	44,497	-1.1	59,095	1.3	56,452	5.6	47,479	4.7	1.3
August 2000	45,282	1.8	59,678	1.0	56,395	-0.1	45,226	-4.7	1.3
September 2000	44,770	-1.1	60,336	1.1	55,417	-1.7	43,792	-3.2	1.3
October 2000	45,481	1.6	60,992	1.1	55,480	0.1	45,544	4.0	1.34
November 2000	45,448	-0.1	61,752	1.2	55,309	-0.3	45,277	-0.6	1.3
December 2000	45,083	-0.8	60,963	-1.3	54,957	-0.6	44,731	-1.2	1.3

Manufacturing industries except motor vehicles, parts and accessories

	Shipme	ents	Invento		Unfilled o	rders	New or	ders
				seasonally a	adjusted			
	\$ millions	% change	\$ millions	% change	\$ millions	% change	\$ millions	% change
December 1999	34,391	1.7	52,402	0.6	48,602	3.0	35,786	4.9
January 2000	34,985	1.7	52,776	0.7	48,735	0.3	35,118	-1.9
February 2000	34,584	-1.1	53,384	1.2	48,924	0.4	34,774	-1.0
March 2000	35,773	3.4	54,047	1.2	49,565	1.3	36,413	4.7
April 2000	34,991	-2.2	54,523	0.9	49,006	-1.1	34,432	-5.4
May 2000	36,023	3.0	55,376	1.6	48,670	-0.7	35,687	3.6
June 2000	36,182	0.4	55,180	-0.4	49,240	1.2	36,753	3.0
July 2000	35,997	-0.5	55,881	1.3	52,077	5.8	38,834	5.7
August 2000	36,617	1.7	56,302	0.8	52,451	0.7	36,991	-4.7
September 2000	36,115	-1.4	56,971	1.2	51,737	-1.4	35,401	-4.3
October 2000	36,898	2.2	57,602	1.1	52.075	0.7	37,236	5.2
November 2000	37,085	0.5	58,442	1.5	51,991	-0.2	37,001	-0.6
December 2000	36,926	-0.4	57,574	-1.5	51,695	-0.6	36,630	-1.0

Statistics Canada - Cat. no. 11-001E

Workplace and Employee Survey 1999

Nearly one-quarter of all workplaces, accounting for more than one-third of paid employees, made a significant investment in new computer technology in 1999, according to data from a new survey. These major investments in computer technology were not associated with either higher employee layoff rates or slower employment growth, at least in the short run, but rather with a burst of computer-related training.

In the 12 months prior to March 1999, an estimated 24% of all establishments accounting for 37% of paid employees implemented a major new software application or hardware installation. These numbers exclude upgrades to existing software applications and hardware installations.

Not surprisingly, workplaces that adopted computer technology provided more computer-related training than did other establishments. However, other data in the survey indicated that employees most often turned to self-learning and on-the-job training to acquire skills applying to specific hardware or software.

While some speculate that the adoption of computer technologies may result in job losses or gains, establishments that adopted technologies had about the same rates of both permanent layoffs and employment growth as other establishments, at least during the year the technology was adopted.

These are initial findings of the 1999 Workplace and Employee Survey, a new survey of 6,300 workplaces and 24,600 of their employees. It will follow workplaces for at least four years and employees for two years, supporting research on both employer and employee outcomes.

Close link between computer technology and training

The association between training and adopting computer technology is obvious: employees need to learn how to use new systems and software. But for employers, the question is how to provide enough training to reap the gains of new technologies without overspending. The survey found that computer technology adoptions generally were associated with substantially higher levels of computer-related training. However, formal training comprised only a small part of overall computer learning activities.

Fifty-one percent of workplaces that adopted computer technology provided formal or informal computer-related training in 1999, almost three times the rate of about 18% among those that did not adopt such technology. However, the intensity of the training

Note to readers

Data in this release come from the new Workplace and Employee Survey (WES), conducted by Statistics Canada with the support of Human Resources Development Canada and the Policy Research Initiative. It is designed to provide an integrated view of the activities of employers and their employees. The survey will enable researchers to link business policies, practices and outcomes with employee characteristics, activities and outcomes.

The WES is a dual survey, with both employer and employee components. Employers are sampled by physical locations. Employees are then sampled from employer-provided lists within each location. The survey covers technology adoption, innovation, human resource practices, labour turnover and business strategies of employers, as well as wages, training, technology use, working hours and other workplace activities of employees.

The WES was conducted for the first time in the summer and fall of 1999. Just over 6,300 workplaces and about 24,600 employees responded to the survey, representing response rates of 94% and 83%, respectively. Beginning with this initial cycle, the survey will follow workplaces for at least four years and employees for two years. This longitudinal aspect will allow researchers to study both employer and employee outcomes over time.

This report focuses on computer technology adopters. A workplace was considered to have adopted computer technology if it had implemented a major new software application and/or hardware installation, excluding hardware or software upgrades, between April 1, 1998 and March 31, 1999. In either case, the implementations would affect at least half of the users in the workplace or a department within the workplace. The per-capita cost of the hardware or software implementations was calculated by adding the cost of the two most expensive implementations and dividing by the total number of employees in the location.

efforts of employers can vary substantially, so it is important to look at the proportion of employees who received training. Twenty-three percent of employees of hardware/software adopters received computer-related training, 1.4 times as many as the 14% of employees of other establishments.

The incidence of training increased with the per-capita cost of the hardware and/or software implemented. Thirty-two percent of employees in establishments that paid on average \$2,500 or more per employee for this new technology received training, compared with 19% of employees in workplaces that spent up to \$699.

The training rates of computer technology adopters may have been elevated simply because they had more computer users. Two-thirds of the employees in implementing establishments use computers, compared with 56% in non-implementing workplaces. But the same result persisted when looking only at computer users: those in technology-adopting workplaces were 38% more likely to receive computer-related training than were computer users in other establishments.

The training boost associated with computer technology implementation was also confirmed with a statistical analysis that controlled for such factors as establishment size, industry, unionization rate and occupational structure.

Despite the strong relationship between hardware or software purchases and computer-related training, computer technology implementations do not seem to have spillover effects into other forms of training. Employees in workplaces that invest in computer technology are no more likely to receive other types of formal or informal training than are their counterparts in other establishments.

Computer users most likely to rely on themselves or co-workers for training

Employees' computer-related learning activities go beyond the formal and informal training provided by their employers. In fact, when asked how they acquired their job-specific computing skills, 45% of employees said they taught themselves using materials such as manuals, books and on-line tutorials.

About the same proportion, 44%, stated that they received on-the-job training provided by co-workers, supervisors, resource people, and so on, while 23% cited employer-paid formal training. Much smaller numbers of employees reported learning their main computer application through college or university courses (7%) or through other self-paid formal training (3%).

This tendency to rely heavily on informal training methods to acquire the skills needed to use computer applications applied equally to employees of computer technology adopters and those of non-adopters.

Thus, establishments adopting computer technologies typically incur not only the direct costs of the hardware and software, but also the elevated formal training costs associated with the implementation. And formal training activities represent only a part of all training activities related to computer applications. Time spent by employees on informal training activities also bear consideration.

Few computer implementations have an immediate impact on employment

Whether computer technology implementations actually displace workers has been much debated. According to the short-run evidence from the survey, jobs are generally no less secure in establishments adopting computer technology than they are in other establishments. Permanent layoff rates tended to be somewhat lower among computer technology implementers (3.4%) than among other establishments (5.1%). Furthermore, layoff rates did not increase with the size of the investment in computer technologies, something one might expect if these technologies were displacing labour in the short-run. A more comprehensive statistical analysis — accounting for possible differences in size, industry, unionization rate and other factors — showed no significant difference in the layoff rates of implementers compared with non-implementers.

The story was much the same for employment growth. Computer technology implementers had a similar rate of growth (4.4%) to non-implementers (4.1%), but further analysis showed that the difference was not significant after controlling for other factors.

Employers corroborated the minimal impact of their computer technology implementations on employment. Among workplaces whose computer implementation was their most expensive technology purchase, 92% reported no impact on non-management employment and 95% reported no impact on management employment.

Employment change and computer technology implementation

	No	Computer
	computer	technology
	technology	implementation
	implementation	
	%	
Workplaces with employment		<u> </u>
declining		
Proportion of workplaces		
declining	8	11
Proportion of employment	16	20
Average employment decline	-11	-8
Workplaces with employment		
unchanged		
Proportion of workplaces with		
no employment change	74	60
Proportion of employment	44	32
Workplaces with employment		
expanding		
Proportion of workplaces		
expanding	19	29
Proportion of employment	40	48
Average employment growth	17	14
And age an playmont growth		

However, averages can be somewhat misleading. In any year, some workplaces contract, others grow. Overall, there was more employment volatility among establishments adopting technologies. The survey found that 29% of workplaces that implemented new hardware or software expanded their work force during the same year, compared with 19% of workplaces with no major computer technology purchases.

About 11% of technology adopters saw their work force shrink, compared with 8% of non-adopting establishments. Further analysis confirmed that computer technology implementers were more likely

than other establishments to either expand or contract, when factors such as industry, size, unionization and occupational structure are controlled for.

It is important to note that these results pertain to a single year. The impact of computer implementations on employment may accumulate over time. As well, the most significant employment effects may have occurred when establishments were first adopting the technologies. Computer use is now widespread, as the survey shows. This issue will be revisited as the Workplace and Employee Survey follows its panel of employers over the next few years.

Other issues that will be examined in forthcoming studies include an overview of workplace practices

in Canadian companies, including "family-friendly" practices; the effect of foreign competition on the productivity-enhancing behavior of companies; a study of job vacancies; and the link between the education level of an establishment's work force and its technology adoption and innovation practices.

For more information on this release, contact Ted Wannell (613-951-3546), Business and Labour Market Analysis Division. For information on the Workplace and Employee Survey, or to enquire about the concepts, methods or data quality of the survey, contact Howard Krebs (613 951-4090; fax: 613-951-4087; *labour@statcan.ca*), Labour Statistics Division.

Computer technology implementation and employee training

	No computer	Computer technology	Cost of	Cost of	Cost of
	technology implementation	implementation	implementation: Low ¹	implementation: Medium ¹	implementation: High ¹
			% of employees		
Received computer-related training	14	23	19	26	32
Computer-related classroom training	9	14	12	14	19
Computer-related on-the-job training	7	12	10	15	15
Received other type of training	44	46	48	41	44
Other type of classroom training	30	31	33	27	30
Other type of on-the-job training	23	24	25	21	23

Low means an investment of from \$1 to \$699 per employee in the establishment, medium is \$700 to \$2,499 per employee, and high is \$2,500 or more per employee.

Computer technology implementation and the training of computer users

	No	Computer	Cost	Cost	Cost
	computer	technology	of	of	of
	technology	implementation	implementation:	implementation:	implementation:
	implementation		Low ¹	Medium ¹	High ¹
			% of employees		
Received computer-related training	24	33	29	38	36
Computer-related classroom training	14	20	18	21	22
Computer-related on-the-job training	12	16	14	21	17

¹ Low means an investment of from \$1 to \$699 per employee in the establishment, medium is \$700 to \$2,499 per employee, and high is \$2,500 or more per employee.

OTHER RELEASES

Construction Union Wage Rate Index January 2001

The Construction Union Wage Rate Index (including supplements) for Canada remained unchanged January from the revised December in level of 117.8 (1992=100). The composite index increased 2.4% compared with the revised January 2000 index.

Union wage rates are published for 16 trades in 20 metropolitan areas for both the basic rates and rates including selected supplementary payments. Indexes (1992=100) are calculated for the same metropolitan areas and are published for those where a majority of trades are covered by current collective agreements.

Construction Union Wage Rate Index, basic rate plus supplements

(1992 = 100)

	January	December	January	January	December
	2000	2000	2001	2000	2000
				to	to
				January	January
				2001	2001
				% ch	ange
Canada	115.0	117.8	117.8	2.4	0.0
St. John's	106.8	110.3	110.3	3.3	0.0
Halifax	114.6	116.0	116.0	1.2	0.0
Saint John	116.0	116.4	116.4	0.3	0.0
Québec	112.0	114.8	114.8	2.5	0.0
Chicoutimi	112.1	114.9	114.9	2.5	0.0
Montréal	112.0	114.8	114.8	2.5	0.0
Ottawa	116.8	119.5	119.5	2.3	0.0
Toronto	115.4	118.0	118.0	2.3	0.0
Hamilton St.	117.1	119.9	119.9	2.4	0.0
Catharines	116.5	119.4	119.4	2.5	0.0
Kitchener	121.0	123.9	123.9	2.4	0.0
London	116.7	119.5	119.5	2.4	0.0
Windsor	115.9	118.9	118.9	2.6	0.0
Sudbury	116.8	119.5	119.5	2.3	0.0
Thunder Bay	116.3	119.2	119.2	2.5	0.0
Winnipeg	111.9	114.3	114.3	2.1	0.0
Calgary	121.1	128.3	128.3	5.9	0.0
Edmonton	123.1	130.4	130.4	5.9	0.0
Vancouver	110.0	110.1	110.1	0.1	0.0
Victoria	109.2	109.2	109.2	0.0	0.0

Available on CANSIM: matrices 956, 958 and 9922-9927.

The fourth quarter 2000 issue of *Construction price statistics* (62-007-XPB, \$24/\$79) will be available in March. See *How to order products*.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Denise Potvin (613-951-3350; fax: 613-951-1539; *infounit*@*statcan.ca*), Prices Division.

Steel primary forms

December 2000

Steel primary forms production for December totalled 1 106 248 metric tonnes, a decrease of 18.8% from 1 362 088 tonnes in December 1999.

Year-to-date production for all of 2000 was 16 496 339 tonnes, up 2.2% from 16 136 095 tonnes in 1999.

Available on CANSIM: matrix 58 (level 2, series 3).

For more information, or to enquire about the concepts, methods or data quality of this release, contact Greg Milsom (613-951-7093; *milsomg@statcan.ca*), Manufacturing, Construction and Energy Division.

Shipments of rolled steel

December 2000

Rolled steel shipments totalled 994 223 metric tonnes in December, down 24.0% from 1 307 628 tonnes in November and down 13.8% from 1 152 638 tonnes in December 1999.

Year-to-date shipments for all of 2000 were 14 919 853 tonnes, down 0.2% from 14 952 400 tonnes in 1999.

Available on CANSIM: matrices 58 and 122 (series 22-25).

For more information or to enquire about the concepts, methods, or data quality of this release, contact Greg Milsom (613-951-7093; *milsomg@statcan.ca*), Manufacturing, Construction and Energy Division.

Stocks of frozen poultry meat

February 1, 2001 (preliminary)

Data on stocks of frozen poultry meat in cold storage on February 1 are now available.

Available on CANSIM: matrices 6575-5677.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Sandra Gielfeldt (613-951-2505) or Gilles Beaudry (613-951-7128), Agriculture Division.

NEW PRODUCTS

Primary iron and steel, December 2000 Catalogue number 41-001-XIB (\$5/\$47). New motor vehicle sales, December 2000 Catalogue number 63-007-XIB (\$13/\$124).

All prices are in Canadian dollars and exclude sales tax. Additional shipping charges apply for delivery outside Canada.

Catalogue numbers with an -XIB or an -XIE extension are Internet versions; those with -XMB or -XME are microfiche; -XPB or -XPE are paper versions; -XDB are electronic versions on diskette and -XCD are electronic versions on compact disc.

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Catalogue 11-001E.

Published each working day by the Communications Division, Statistics Canada, 10-H, R.H. Coats Bldg., Tunney's Pasture, Ottawa, Ontario K1A 0T6.

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