



The Daily

Statistics Canada

Tuesday, February 19, 2002

Released at 8:30 am Eastern time

MAJOR RELEASES

- **Monthly Survey of Manufacturing, December 2001 and annual 2001**

Manufacturers' shipments fell 1.8% in December to \$40.4 billion, the third significant decrease in four months. Shipments have dropped 12.3% from their peak of \$46.0 billion in October 2000. In contrast, manufacturers' inventories, which slipped 0.4% in December, have declined only 2.9% since October 2000.

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- **Livestock estimates, January 1, 2002**

Cattle inventories declined slightly as exports soared. Meanwhile, hog inventories climbed as exports reached a record high. The vast majority of cattle and hog exports went to the United States.

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MAJOR RELEASES

Monthly Survey of Manufacturing

December 2001 and annual 2001

Manufacturers' shipments fell 1.8% in December to \$40.4 billion, the third significant decrease in four months. Shipments have dropped 12.3% from their peak of \$46.0 billion in October 2000. In contrast, manufacturers' inventories, which slipped 0.4% in December, have declined only 2.9% since October 2000. Economic uncertainty, weak demand and stubbornly high finished-product inventories challenged the manufacturing sector throughout 2001. These factors prompted manufacturers to curtail production and reduce employment (-4.8%) in 2001, which led to the significant decline observed in the manufacturing sector since the fourth quarter of 2000.

Looking ahead, manufacturers expressed continuing dissatisfaction with finished-product inventories in the January 2002 Quarterly Business Conditions Survey. The survey showed that almost one-third of manufacturers thought their finished-product inventory levels were still too high, and more than one-third expected to reduce production during the next three months. As well, one-quarter of manufacturers reported their workforce would decline.

In December, 15 of 21 industries, representing 84% of total shipments, lost ground. Inventories fell 0.4% to \$62.8 billion, the seventh consecutive decline, and finished-product inventories dropped 1.0%. Despite the significant cut in shipments and the string of decreases in inventories, manufacturing stocks remain excessive — in December, the inventory-to-shipments ratio leaped to 1.56, nearing its nine-year high.

Both unfilled orders and new orders also decreased in December. Unfilled orders dropped 1.5% to \$46.8 billion, the fifth consecutive decline, while new orders finished the year down 2.5%.

Shipments decline is widespread

Several industries contributed to December's decline in manufacturing shipments. The chemical products industry reported a 5.7% decrease to \$2.8 billion, the lowest value since April 2000. Shipments fluctuated over the second half of 2001. December's loss reversed the industry's gains of October and November.

Widespread decreases resulted in a 5.9% drop in shipments in the fabricated metal products industry to \$2.1 billion. December's shipments were the lowest since mid-1999. Paper manufacturing also fell 4.7%

Note to readers

In addition to current-month estimates, data for the previous three months are regularly revised. Factors influencing revisions include late receipt of company data, incorrect information reported earlier, replacement of estimates with actual figures (once available), and seasonal adjustments. Consult the appropriate CANSIM tables for revised data.

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. Readers 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.

in December, following a 1.7% drop in November. Continued market uncertainty and lower industrial prices for pulp and paper products (-1.3% in December) contributed to the decline. Manufacturers of petroleum and coal products reported shipments of \$2.2 billion, a decrease of 3.5%. Slumping industrial prices for petroleum and coal products, down 26.9% over the course of 2001, contributed to the industry's decline. As well, several refineries operated at reduced capacity because of maintenance shutdowns over the latter half of 2001.

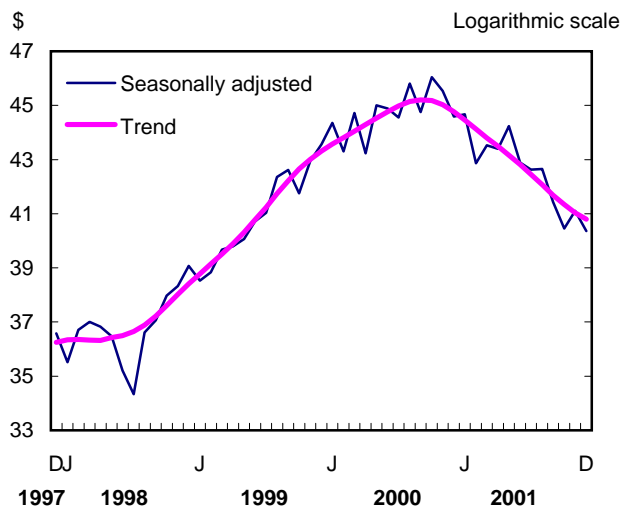
Shipments by province and territory

	Nov. 2001	Dec. 2001	Nov. to Dec. 2001
Seasonally adjusted			
	\$ millions		% change
Newfoundland and Labrador	180	181	0.6
Prince Edward Island	97	108	11.0
Nova Scotia	669	672	0.5
New Brunswick	940	982	4.4
Quebec	9,764	9,690	-0.8
Ontario	21,898	21,397	-2.3
Manitoba	941	913	-3.0
Saskatchewan	579	573	-1.0
Alberta	3,355	3,210	-4.3
British Columbia	2,676	2,635	-1.5
Yukon, Northwest Territories and Nunavut	4	3	-27.7

Partly offsetting December's overall decrease in shipments, the wood products industry rose 4.0% from November to \$2.2 billion, the first increase in six months. Both shipments and inventories had been declining since the early summer of 2001, as manufacturers drew down their inventories.

Shipments dropped in six provinces and the territories in December.

Manufacturing shipments fall back for the third time in four months



Manufacturers cut inventories for the seventh straight month

Manufacturers' inventories declined for the seventh straight month, the longest consecutive monthly string of inventory declines since the recession of the early 1990s. Inventories fell 0.4% in December to \$62.8 billion, their lowest since June 2000. Throughout 2001, manufacturers curtailed production in an attempt to reduce inventories. Levels have been slow to fall, declining 4.5% since peaking at \$65.8 billion in November 2000.

Finished-product inventories declined 1.0% in December to \$19.4 billion, a 15-month low. Finished-product inventories have fallen 4.2% since reaching their apex of \$20.2 billion in June 2001. The trend for finished-product inventories declined modestly since June 2001, although it has levelled off in recent months. Raw materials (-0.2%) and goods-in-process (-0.1%) inventories also fell in December.

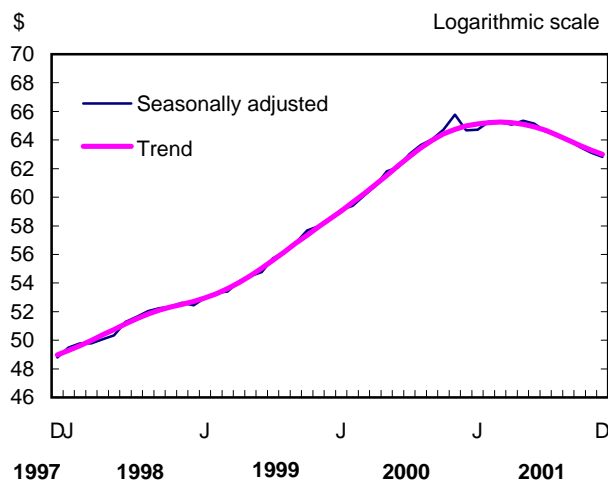
The wood products and aerospace products and parts industries were the main contributors to lower inventories in December. Wood product inventories fell 2.7% to \$4.5 billion, the lowest level

since September 1999. In recent months, newly instated softwood lumber duties have contributed to the uncertainty in the wood products industry, and have been a factor in several mill closures, as well as volatile prices. Inventories fell for the sixth straight month. Aerospace products and parts inventories, which had built up in recent years, levelled off during the fourth quarter of 2001. Manufacturers cut inventories 1.4% to \$8.0 billion in December. Inventories had peaked at \$8.2 billion in September, but the prevailing insecurity of the world's aviation sector has led to recent production cuts and falling stocks.

Chemical industry inventories were also lower, falling 1.6% to \$5.1 billion in December, as manufacturers drew down their finished-products stocks. Computer and electronic products manufacturers cut inventories by 1.3%, the lowest point since June 2000. Computer and electronic product inventories have fallen 20.4% since peaking at \$6.9 billion in November 2000.

Increases in primary metal products (+1.5%) and fabricated metal products (+1.4%) inventories marginally offset December's overall decrease in inventories.

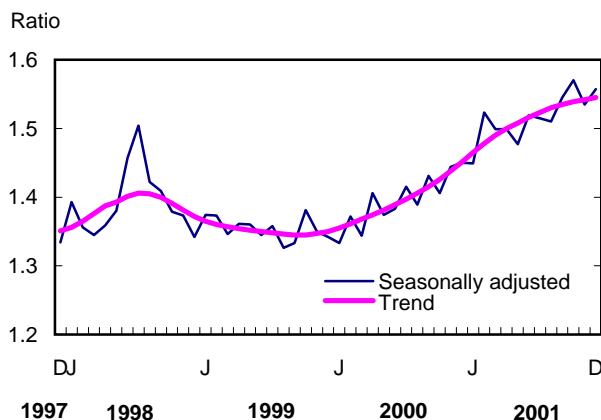
Manufacturers reduce inventories for the seventh straight month



The inventory-to-shipment ratio rose to 1.56 in December — inventories fell, but shipments fell more. The December ratio is just shy of October's nine-year high of 1.57. As the economy slowed in 2001, manufacturers cut production sharply, but inventories were slower to respond, resulting in a rising ratio in recent months. The trend of the inventory-to-shipment ratio, which had been climbing consistently since late 1999, remained

unchanged at 1.54 for the third straight month. The finished-products inventory-to-shipment ratio also stayed constant for a second month at 0.48. This ratio had been rising since mid-2000.

Declining shipments boost the inventory-to-shipment ratio



Unfilled orders hit a 25-month low

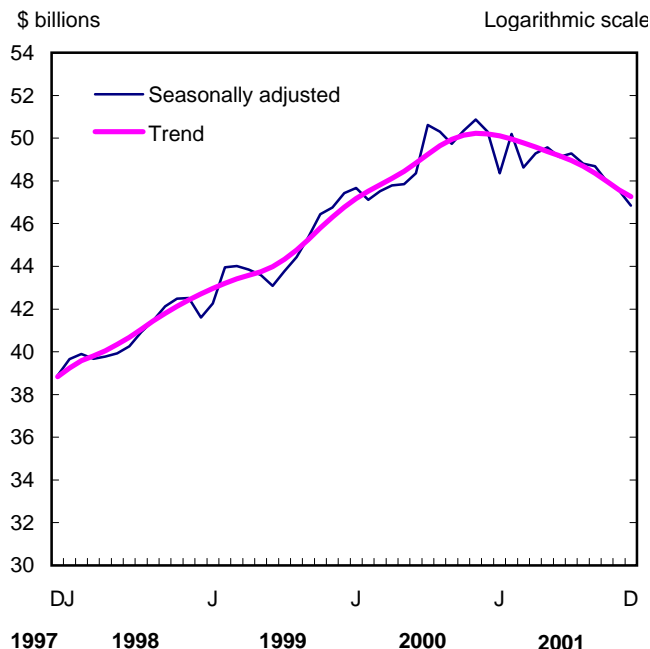
Unfilled orders fell 1.5% to \$46.8 billion in December; this was the fifth consecutive monthly decline, and the lowest level since November 1999. Peaking at \$50.9 billion in November 2000, unfilled orders have since fallen 7.9%. The trend (-0.7% in December) moderately declined since December 2000, coinciding with the general deceleration of the economy.

The fourth quarter of 2001 ended on a downward note for the aerospace product and parts industry as unfilled orders fell for the third straight month. The recent uncertainty in the aviation sector continued to linger as unfilled orders fell 1.6% to \$20 billion in December. Unfilled orders in the computer and electronic products industry decreased throughout 2001, except in May and August. Orders ended the year at \$3.7 billion, down 5.1% from November, and 31.0% below December 2000's peak of \$5.3 billion.

Partly offsetting December's overall decline in unfilled orders, machinery rose 0.9% from November to \$6.9 billion, the fifth consecutive monthly rise.

New orders fell 2.5% to \$39.7 billion, the lowest since April 1999. New orders have been generally declining since late 2000.

Unfilled orders end 2001 on a down note



Manufacturing slumped in 2001

The year 2001 marked a turning point for the manufacturing sector; shipments fell 5.2% following strong increases in 1999 (+11.5%) and 2000 (+9.2%). Inventories (-3.0%), unfilled orders (-7.2%) and new orders (-6.3%) also declined in 2001.

Plant slowdowns and closures, contract cancellations, and falling industrial prices were among several factors influencing the manufacturing sector in 2001. Sixteen of 21 industries representing 72% of total shipments reported declines. Shipments of computer and electronic products plummeted 32.1% in 2001, wiping out most of the gains of 2000. Falling global demand, production over-capacity and persistently high finished-product inventories contributed to the industry's abrupt downturn. The transportation equipment industry fell 8.8% in 2001. Specifically, motor vehicles dropped 14.8% and motor vehicle parts decreased 10.9%, as lower demand and excessive retail inventories hampered the motor vehicle sector. Shipments in the paper (-7.4%) and primary metals (-5.4%) industries also declined sharply. A 6.5% increase in food manufacturing, as well as higher chemical product shipments (+3.1%) slightly offset 2001's overall decline.

Among the provinces, Ontario's shipments dropped 6.3% in 2001 compared with 2000, as the manufacturing sector reeled from cutbacks in the transportation equipment and computer and electronic products industries. Significant decreases in the machinery and primary metal products industries also contributed to the decline. In Quebec, shipments of computer and electronic products fell by almost one-half in 2001, pulling down the province's total shipments 5.2%. The petroleum and coal products and textile mill industries also declined, offsetting the advances of Quebec's chemical products industry and food sector.

Western Canada was not immune to the downturn in manufacturing. British Columbia's resource-based economy was hit hard; shipments declined 9.7% over 2001. Lower pulp and paper prices contributed to the declines in the paper industry, and the expiration of the Canada-US softwood lumber agreement was a factor in the weakening of the province's wood products industry. In Alberta, strong shipments by food and machinery manufacturers largely offset decreases in the computer and electronic products, petroleum and coal products and paper industries. Overall, Alberta's manufacturing sector slipped a moderate 0.3% in 2001. Saskatchewan manufacturers reported a 4.5% decline

in shipments, pulled down by the electrical equipment, components and appliances. Manitoba's annual shipments rose 0.6%, supported by higher values for the chemical products, transportation equipment and furniture industries.

In Atlantic Canada, all provinces with the exception of Newfoundland (-0.9%), reported higher annual shipments in 2001. A strong increase in the non-durable goods sector boosted shipments in New Brunswick (+7.3%). Nova Scotia (+0.7%) and Prince Edward Island (+1.6%) were up as well.

Available on CANSIM: tables 304-0014 and 304-0015.

The December 2001 issue of the *Monthly Survey of Manufacturing* (31-001-XIB, \$15/\$147) will be available shortly. See *How to order products*.

Data for shipments by province in greater detail than normally published may be available on request. To order data, or for general information, contact the dissemination officer (1-866-873-8789; 613-951-9497; manufact@statcan.ca). 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

	Shipments		Inventories		Unfilled orders		New orders		Inventories-to-shipments ratio
	Seasonally adjusted								
	\$ millions	% change	\$ millions	% change	\$ millions	% change	\$ millions	% change	
December 2000	44,592	-2.1	64,675	-1.7	50,302	-1.1	44,019	-4.4	1.45
January 2001	44,668	0.2	64,723	0.1	48,352	-3.9	42,719	-3.0	1.45
February 2001	42,868	-4.0	65,287	0.9	50,186	3.8	44,701	4.6	1.52
March 2001	43,535	1.6	65,239	-0.1	48,634	-3.1	41,983	-6.1	1.50
April 2001	43,397	-0.3	65,071	-0.3	49,277	1.3	44,040	4.9	1.50
May 2001	44,231	1.9	65,350	0.4	49,570	0.6	44,524	1.1	1.48
June 2001	42,886	-3.0	65,146	-0.3	49,121	-0.9	42,437	-4.7	1.52
July 2001	42,633	-0.6	64,585	-0.9	49,292	0.3	42,804	0.9	1.51
August 2001	42,651	0.0	64,404	-0.3	48,806	-1.0	42,165	-1.5	1.51
September 2001	41,429	-2.9	63,998	-0.6	48,694	-0.2	41,317	-2.0	1.54
October 2001	40,460	-2.3	63,521	-0.7	47,948	-1.5	39,715	-3.9	1.57
November 2001	41,103	1.6	63,095	-0.7	47,539	-0.9	40,693	2.5	1.54
December 2001	40,364	-1.8	62,827	-0.4	46,836	-1.5	39,662	-2.5	1.56

Manufacturing industries except motor vehicles, parts and accessories industry

	Shipments		Inventories		Unfilled orders		New orders	
	Seasonally adjusted							
	\$ millions	% change	\$ millions	% change	\$ millions	% change	\$ millions	% change
December 2000	36,557	-1.5	60,998	-1.8	48,501	-1.0	36,069	-4.1
January 2001	37,082	1.4	61,238	0.4	46,614	-3.9	35,195	-2.4
February 2001	35,606	-4.0	61,808	0.9	48,426	3.9	37,418	6.3
March 2001	35,882	0.8	61,782	-0.0	46,949	-3.1	34,405	-8.1
April 2001	35,520	-1.0	61,652	-0.2	47,610	1.4	36,182	5.2
May 2001	35,891	1.0	61,919	0.4	47,952	0.7	36,232	0.1
June 2001	34,994	-2.5	61,765	-0.2	47,544	-0.8	34,587	-4.5
July 2001	34,744	-0.7	61,172	-1.0	47,738	0.4	34,938	1.0
August 2001	35,009	0.8	61,022	-0.2	47,211	-1.1	34,481	-1.3
September 2001	33,758	-3.6	60,729	-0.5	47,150	-0.1	33,697	-2.3
October 2001	33,197	-1.7	60,236	-0.8	46,497	-1.4	32,544	-3.4
November 2001	33,493	0.9	59,785	-0.7	46,087	-0.9	33,083	1.7
December 2001	32,744	-2.2	59,460	-0.5	45,327	-1.6	31,984	-3.3



Livestock estimates

January 1, 2002

The national herd of cattle and calves fell slightly amid a favourable export market, according to a survey of 10,000 farmers. The vast majority of these exports went to the United States.

As of January 1, farmers had an estimated 13.0 million head of cattle and calves on their farms, about 37,000 fewer than they had on January 1, 2001. Inventories were 3.4% short of their 1997 peak.

This decline occurred in the wake of a 36.8% increase in exports of live animals during 2001, and a 12.2% increase in exports of butchered beef (measured by cold dressed weight). Domestic slaughter fell 2.0%. Localized dry conditions in the prairies may have affected farmers' decisions to ship cattle south of the border for feeding, finishing and slaughter.

Other factors behind the exports were a favourable exchange rate, growth in the American demand for beef, and strong prices. These were more than enough to overcome any setbacks in trade resulting from the heightened border security following September 11.

In contrast, hog inventories rose even though exports reached a record high. Farmers estimated they had 13.1 million head of hogs on their farms on January 1, up 3.3% from January 1, 2001.

Sheep and lamb exports also surged in the wake of increased demand and a lower Canadian dollar. After growing significantly during the last three years, sheep and lamb inventories fell almost 4.7%. Farmers had an estimated 801,100 animals on their farms as of January 1.

The January Livestock Survey was conducted during late December and early January. Farmers were asked to report the number of livestock on their farm as of January 1.

Livestock inventories

January 1

	Cattle		Hogs		Sheep and lambs	
	2001	2002	2001	2002	2001	2002
	'000 head					
Canada	12,996	12,959	12,642	13,060	840	801
Atlantic	297	294	392	401	33	32
Quebec	1,246	1,281	3,792	3,769	173	180
Ontario	2,025	2,007	3,387	3,142	245	195
Manitoba	1,220	1,210	1,984	2,391	90	86
Saskatchewan	2,235	2,325	1,071	1,180	92	95
Alberta	5,356	5,213	1,868	2,028	167	165
British Columbia	617	630	149	150	40	49

Note: Figures may not add up to totals due to rounding.

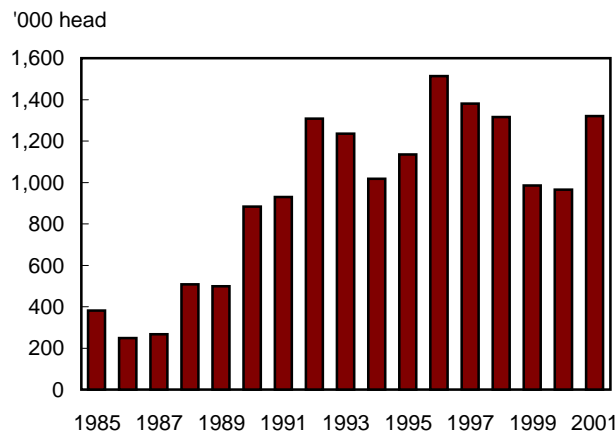
Canadian cattle sector gains stature as export industry

Trade with the United States in live cattle and beef has increased the importance of the Canadian cattle sector as an export industry. As exports south of the border continue to grow, the cattle and beef sector keeps an eye on exchange rates, the American cattle cycle, consumer demand and government policies.

Cattle exports reached 1.3 million head as of January 1, up 36.8% from January 1, 2001. Exports climbed in the early 1990s, coinciding with free trade, and reached record levels in 1996. Subsequently, exports declined from 1997 to 2000 before surging in 2001.

Alberta, a major contributor to Canada's cattle production, accounts for roughly 40% of national cattle inventories and 62.0% of slaughter. The province's cattle herd dwindled from 5.4 million head on January 1, 2001 to 5.2 million a year later.

Total exports of cattle



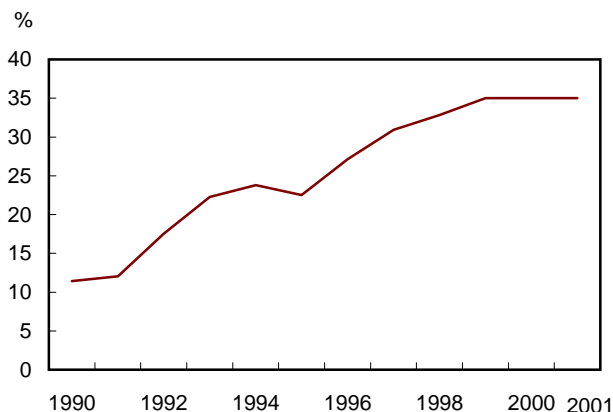
Exports account for about one-quarter of live cattle production — that is, total slaughter plus exports, less imports. The United States receives virtually all Canada's cattle exports, but some animals are shipped to Japan, Taiwan and South Korea.

Canada exported 528 278 metric tonnes of butchered beef in the first 11 months of 2001, up 12.2% from the same period in 2000. During the 1990s, the impact of exports escalated as the proportion of beef production sent to the United States climbed. In 1990, Canada exported 11.0% of its production south of the border — by 2001, this had tripled.

Traditionally, the United States accounted for roughly 90% of Canadian beef exports. This proportion

declined to 80% during the past two years as other countries purchased more beef from Canada. Major customers now include Japan, Mexico and South Korea.

**Canadian beef production
exported to the United States**



Hog industry sees stronger prices behind growth in inventories

The increase in hog inventories can be partly explained by stronger prices in 2001. Domestic hog prices, which are heavily influenced by the United States, increased by at least 10%.

Canada exported a record 1.4 million hogs in the fourth quarter. The United States receives nearly all hog exports. The dramatic rise in the number of weanling pigs shipped south of the border during 2001 contributed to this increase. The hog industry is showing signs of growth as the breeding stock expands.

Pork exports rose 11.5%. The United States accounted for over 59.3% of pork exports and Japan, 21.4%.

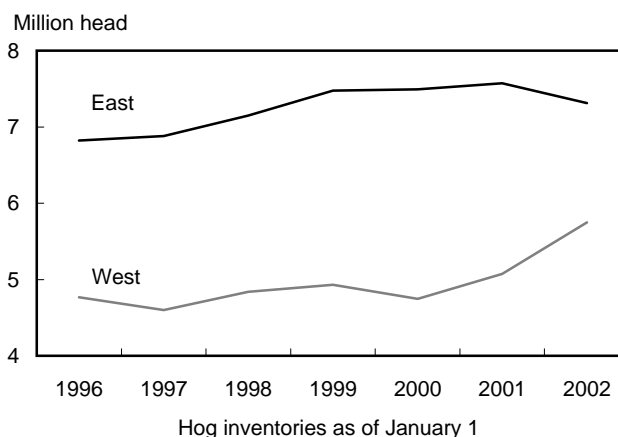
Recently, the United States has been facing modest declines in hog inventories, according to the US Department of Agriculture. The Canadian hog industry is significantly influenced by the American hog sector as well as the exchange rate.

In the fourth quarter, inventories dropped 2.3% compared with the third quarter in the eastern provinces (Newfoundland and Labrador, Prince Edward Island, Nova Scotia, New Brunswick, Quebec and Ontario). Inventories expanded 4.2% in the western

provinces (Manitoba, Saskatchewan, Alberta and British Columbia). The eastern provinces account for about 56% of hog inventories.

The hog industry is showing signs of growth, in light of an expanding breeding stock and farrowings (sows giving birth). On January 1, Canada's breeding herd was 7.5% larger than it was a year earlier, and farrowing was up 8.7%. Farrowing intentions for the first quarter of 2002 are 0.4% lower than actual farrowing during the fourth quarter of 2001.

Hog industry showing signs of growth



Data on cattle by farm type are now available. At the national level, the 13.0 million head of cattle and calf inventories are separated into dairy and beef operations. The beef operations are then classified as cow-calf operations, feeder-stocker operations, or feeding operations. The national-level decrease in inventories is mainly the result of fewer of cattle on feeding operations.

Available on CANSIM: tables 003-0004 and 003-0030 to 003-0032.

Livestock statistics — update (23-603-UPE, \$45/\$149) will be available soon. See *How to order products*.

For data enquiries, contact Robert Plourde (613-951-8716; robert.plourde@statcan.ca). To enquire about the concepts, methods or data quality of this release, contact the Agriculture Division information line (1-800-465-1991). ■

OTHER RELEASES

National supply and disposition of major grains

2000/2001

Data on the national supply and disposition of major grains for the 2000/2001 crop year are now available.

Available on CANSIM: tables 001-0011 and 001-0039.

The December 2001 issue of the *Cereals and oilseeds review* (22-007-XIB, \$11/\$112; 22-007-XPB, \$15/\$149) 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 Karen Gray (204-983-2856; karen.gray@statcan.ca) or Susan Anderson (613-951-3859; sue.anderson@statcan.ca), Agriculture Division. ■

Pipeline transportation of crude oil and refined petroleum products

September 2001

Net receipts of crude oil and equivalent hydrocarbons totalled 12 862 183 cubic metres in September, down 2.0% from September 2000. Year-to-date receipts to the end of September were 122 557 864 cubic metres, up 3.3% from the same period in 2000. Net receipts of liquefied petroleum gases and refined petroleum products totalled 6 037 294 cubic metres

in September, down 11.5% from September 2000. Year-to-date receipts were 57 805 329 cubic metres, down 5.8% from the same period in 2000.

Pipeline exports of crude oil totalled 5 640 156 cubic metres, down 6.6% from September 2000, and pipeline imports were 1 779 373 cubic metres, a decrease of 8.4%. Year-to-date exports totalled 56 463 116 cubic metres, up 3.0% from the same period in 2000. Year-to-date imports stood at 18 570 422 cubic metres, a decrease of 1.3%.

September deliveries of crude oil by pipeline to Canadian refineries totalled 5 272 779 cubic metres, down 9.9% from September 2000. Deliveries of liquefied petroleum gases and refined petroleum products dropped 33.2% to 392 310 cubic metres. Year-to-date deliveries of crude oil to refineries totalled 52 470 454 cubic metres, down 0.7% from the same period in 2000.

Available on CANSIM: tables 133-0001 to 133-0005.

The September 2001 issue of *Pipeline transportation of crude oil and refined petroleum products*, Vol. 51, no. 9 (55-001-XIB, \$9/\$86) is now available. See *How to order products*.

To order data, or for general information, contact the dissemination officer (1-866-873-8799; 613-951-9497; energ@statcan.ca). To enquire about the concepts, methods or data quality of this release, contact Gerry Desjardins (613-951-4368; desjger@statcan.ca) or Eleonore Harding (613-951-5708; hardele@statcan.ca), Manufacturing, Construction and Energy Division. ■

NEW PRODUCTS

Coal and coke statistics, Vol. 80, no. 10, October 2001
Catalogue number **45-002-XIB** (\$9/\$85).

Pipeline transportation of crude oil and refined petroleum products, Vol. 51, no. 9, September 2001
Catalogue number **55-001-XIB** (\$9/\$86).

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

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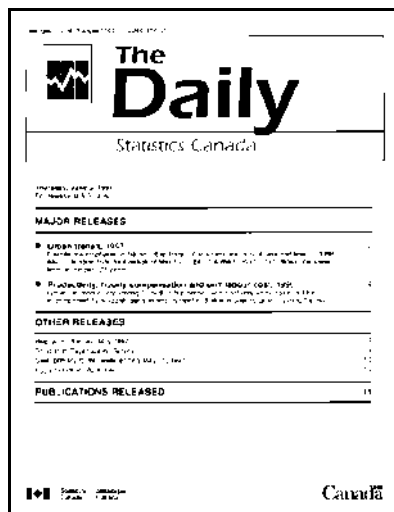
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Editor: Tom Vradenburg (613-951-1103, tom.vradenburg@statcan.ca)

Head of Official Release: Madeleine Simard (613-951-1088), madeleine.simard@statcan.ca

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