Catalogue 11-001-XIE (Français 11-001-XIF) ISSN 0827-0465

The Daily

Statistics Canada

Friday, August 1, 2003
Released at 8:30 a.m. Eastern time

MAJOR RELEASES

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MAJOR RELEASES

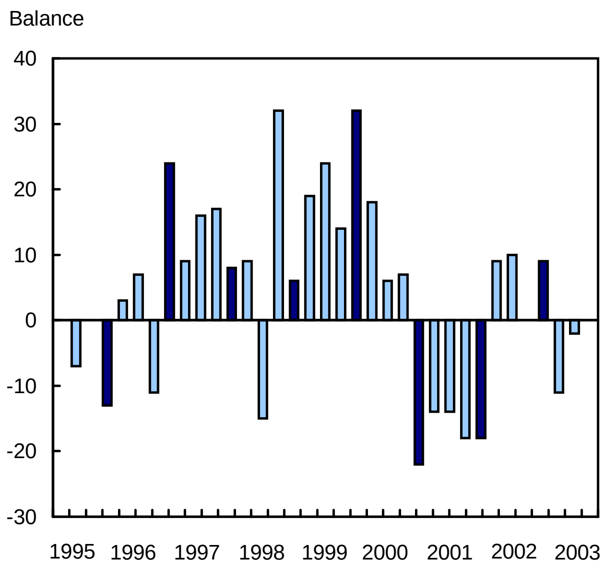
Business Conditions Survey: Manufacturing industries

July 2003

Concerned with lower levels of unfilled orders and higher finished product inventories, manufacturers did not expect to crank up production in the coming three months. In early July more manufacturers cited the appreciation of the Canadian dollar as a concern. Furthermore, bovine spongiform encephalopathy (BSE or mad cow disease) affected everything from meat packing plants, to animal food manufacturers and suppliers to these industries.

The voluntary survey, to which almost 4,000 manufacturers responded, requests opinions on production impediments, finished product inventory levels, new and unfilled order levels, production and employment prospects in the coming three months.

Balance of opinion for expected volume of production next three months vs. last three months



Fewer manufacturers expect to decrease production

In July, 22% of manufacturers stated they would decrease production in the third quarter, while 20% expected to increase production, leaving the balance of opinion at -2. This was a 9 point rise from April but fell short of the January balance of +9. Producers in the transportation equipment, petroleum and coal products and primary metal industries were the major contributors to the increase. By province, manufacturers in Quebec were the least optimistic about production prospects for the coming three months.

The balance of opinion was determined by subtracting the proportion of manufacturers that stated production would decrease in the coming three months from the proportion who stated production would be increasing.

Note to readers

The business conditions survey is conducted in January, April, July and October; the majority of responses are recorded in the first two weeks of these months. Results are based on replies from about 4,000 manufacturers and are weighted by a manufacturer's shipments or employment. Consequently, larger manufacturers have a correspondingly larger impact on the results than smaller manufacturers.

Except for the data on production difficulties, data in this release are seasonally adjusted.

The Business Conditions Survey has adopted the North American Industry Classification System (NAICS) for its 2003 reference year. Previous years' data have been re-calculated to the new classification system back to 1992 to aid users with historical continuity. Detailed NAICS estimates are now available on CANSIM.

Developed by the statistical agencies of Canada, Mexico and the United States, NAICS is designed to provide a common statistical framework and common definitions of the industrial structure of the three countries. The new classification facilitates the analysis and improves the comparability of the three countries' data.

Unfilled orders level a greater source of concern coast to coast

The balance of opinion concerning the current level of unfilled orders was -28 in July, as more than one third (34%) of manufacturers said their level of unfilled orders was lower than normal and only 6% said it was higher than normal. Producers in the transportation equipment, computer and electronic product and fabricated metal product industries led the 19 of 21 major industry groupings who contributed to the 8 point drop in the balance.

According to the Monthly Survey of Manufacturing, unfilled orders in May stood at slightly more than $40.5 billion, down 13.3% from May 2002 and the lowest level since June 1998.

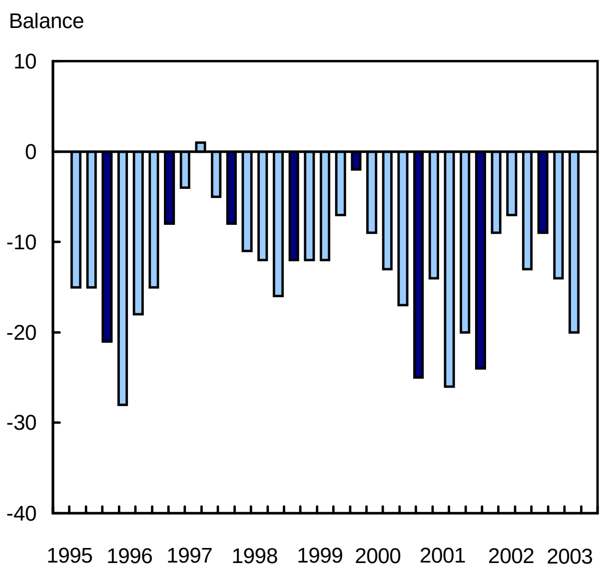
Slight rise in the level of orders received

The balance of opinion on the current level of orders received increased 8 points to -8 in July. The proportion of manufacturers who stated that orders were declining fell to 22% in July from 26% in April. Again, producers in the transportation equipment, computer and electronic product, primary metals industries were the major contributors to the change in the balance.

Higher finished product inventories a rising preoccupation

In July, 72% of manufacturers reported that the current level of finished product inventories was about right, down 8% from April. While 24% of manufacturers stated that inventories were too high, 4% said inventories were too low, leaving the balance of opinion at -20 a 6-point drop from the April survey. Manufacturers in Quebec and Ontario were the major contributors to the change in the balance. According to the Monthly Survey of Manufacturing for May, finished product inventories posted a 0.3% increase to over $20 billion, their highest level since June 2001.

Balance of opinion for current level of finished-product inventory on hand



Employment prospects dropped slightly

The balance of opinion for employment prospects for the next three months decreased a further 2 points to -7 in July. While 80% of manufacturers stated that they would keep or add to their workforce, 20% indicated that they expected to decrease employment in the coming quarter.

According to the latest release of the Labour Force Survey, manufacturing employment fell by 23,000 in June, the sixth decrease in the last seven months. There were 89,000 fewer factory workers in June (-3.7%) than in November 2002.

More manufacturers reported production impediments

About 79% of manufacturers reported little in the way of production impediments in July, down 5 points from the January survey. The proportion reporting a shortage of skilled labour increased 2 points to 7%. A shortage of unskilled labour was reported by 2% of manufacturers. Other impediments reported by 5% of manufacturers included the appreciation of the Canadian dollar and BSE.

Available on CANSIM: tables 302-0007 and 302-0008.

Definitions, data sources and methods: survey number 2152.

For general information or to order data, contact the dissemination officer (1-866-873-8789; 613-951-9497; fax: 613-951-9499; *manufact@statcan.ca*). To enquire about the concepts, methods or data quality of the release, contact Claude Robillard (613-951-3507; *claude.robillard@statcan.ca*), Manufacturing, Construction and Energy Division

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Business Conditions Survey: Manufacturing industries

	July 2002	October 2002	January 2003	April 2003	July 2003
	Seasonally adjusted				
Volume of production during next three months compared with last three months will be:					
About the same (%)	69	66	63	51	58
Higher (%)	20	17	23	19	20
Lower (%)	10	17	14	30	22
Balance	10	0	9	-11	-2
Orders received are:					
About the same (%)	60	55	71	64	64
Rising (%)	22	27	15	10	14
Declining (%)	18	18	14	26	22
Balance	4	9	1	-16	-8
Present backlog of unfilled orders is:					
About normal (%)	70	74	70	66	60
Higher than Normal (%)	14	8	12	7	6
Lower than Normal (%)	16	18	18	27	34
Balance	-2	-10	-6	-20	-28
Finished product inventory on hand is:					
About right (%)	80	78	83	80	72
Too low (%)	6	5	4	3	4
Too high[1] (%)	14	18	13	17	24
Balance	-8	-13	-9	-14	-20
Employment during the next three months will:					
Change little (%)	72	72	74	69	67
Increase (%)	13	13	13	13	13
Decrease (%)	15	15	13	18	20
Balance	-2	-2	0	-5	-7
	Unadjusted				
	%				
Sources of production difficulties:					
Working capital shortage	2	2	3	3	4
Skilled labour shortage	7	6	6	5	7
Unskilled labour shortage	2	4	1	1	2
Raw material shortage	3	2	3	4	3
Other difficulties	2	3	2	3	5
No difficulties	83	84	85	84	79

1 *No evident seasonality.*

■

Government expenditures on culture

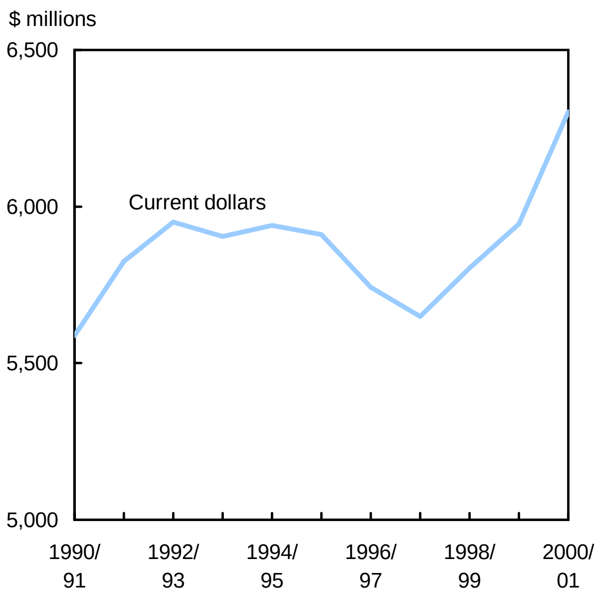
2000/01

Government spending on cultural activities and institutions rose for the third straight year in 2000/01.

In total, all three levels of governments spent just over $6.3 billion on everything from operating government departments related to culture, to financial assistance to artists and organizations in the culture sector.

This was an increase of 6.0%, a much faster pace of growth compared with 2.4% in 1999/2000 and 2.7% in 1998/99. Before 1998/99, spending had declined for three consecutive years.

Total government expenditures on culture



From 1999/2000 to 2000/01, the implicit price deflator for all government expenditure advanced 3%.

On a per capita basis, the total spending represented an estimated $204 per person compared with about $194 in 1999/2000.

Fastest rate of growth in cultural spending among municipalities

From 1999/2000 to 2000/01, spending on cultural activities and institutions grew fastest among Canada's municipalities.

Note to readers

The survey of federal and provincial/territorial government expenditures on culture is a census of all 29 federal and 180 provincial/territorial departments and agencies with culture-related expenses. This release includes results for the financial year from April 1, 2000 to March 31, 2001. Municipal data are based on a sample of municipalities for the financial year from January 1 to December 31, 2000.

There are three main categories of spending on culture: operating expenditures, capital expenditures, and grants and contributions.

***Operating expenditures** include the direct operating program costs of cultural department and ministries, excluding their related corporate costs (such as the corporate costs of the Department of Canadian Heritage). Total operating expenditures, including corporate costs, have been included for cultural agencies (such as the Telefilm Canada).*

***Capital expenditures** are those associated with the construction and acquisition of building, machinery, equipment and land.*

***Grants and contributions** represent direct financial assistance to artists and organizations in the culture sector. Government cultural spending is primarily financed through government appropriations but also includes revenues generated from other sources such as advertising.*

The survey results do not include data from the Government of Nunavut, which failed to respond to the survey. The missing information is estimated at 0.1% of the total provincial and territorial cultural budget and will have a minor impact on data comparability.

Historical expenditures on some activities (such as school libraries) have been revised to conform to the data of the current year.

Municipal governments spent $1.7 billion on culture. At the same time, the federal government spent $3.0 billion, and the provinces and territories, $2.1 billion.

During the 1990s, the municipalities' share of total government spending on culture increased while the federal share declined.

In 1990/91, federal spending accounted for 49% of the total, provincial and territorial spending accounted for 30% and municipal spending, for 21%. Ten years later, federal spending accounted for 44% of total expenditures, compared with 31% for the provinces and territories and 25% for municipalities.

On a per capita basis, federal cultural outlays were the highest in the north — the Northwest Territories ($753), Yukon ($414) and Nunavut ($228). Federal spending was the lowest in British Columbia ($39).

Per-capita government expenditures on culture
2000/01

	Federal	Provincial/ territorial	Municipal[1]
		$	
Canada	**96**[2]	**68**	**54**
Newfoundland and Labrador	85	61	20
Prince Edward Island	119	80	16
Nova Scotia	95	64	39
New Brunswick	65	55	28
Quebec	135	99	46
Ontario	98	45	58
Manitoba	59	82	47
Saskatchewan	40	71	56
Alberta	48	65	48
British Columbia	39	75	70
Yukon	414	451	19
Northwest Territories	753	172	34
Nunavut	228	..	1

1 *Municipal spending is on a calendar-year basis.*
2 *Also includes unallocated expenditures.*
.. *Figures not available.*

Provincial and territorial spending was below the national average ($68) in Newfoundland and Labrador, Nova Scotia, New Brunswick, Ontario and Alberta. Per capita municipal spending exceeded the national average ($54) only in Ontario, Saskatchewan and British Columbia.

Government expenditures on culture

	1990/ 91	1993/ 94	1996/ 97	1999/ 2000	2000/ 01	1999/2000 to 2000/01
			$ millions			% change
Federal	2,893	2,823	2,764	2,818	2,961	5.1
Provincial-territorial	1,778	1,939	1,778	1,987	2,088	5.1
Municipal[1]	1,237	1,493	1,526	1,536	1,660	8.1
All levels[2](current dollars)	5,587	5,904	5,742	5,945	6,303	6.0

1 *Municipal spending is on a calendar-year basis.*
2 *These totals exclude inter-governmental transfers; therefore, they cannot be derived by adding the three figures above.*
Note: *Some of the figures in this table are revised.*

Federal spending: Increase in grants to artists

Federal cultural spending, which represented 1.7% of the total federal budget in 2000/01, reached a record high of $3.0 billion.

Federal spending on operations and capital projects by departments and agencies, such as the Canadian Broadcasting Corporation (CBC), the Canadian Radio-television and Telecommunications Commission (CRTC) and national historic parks, increased 5.7% to $2.4 billion in 2000/01. Nevertheless, this share of the total federal cultural budget fell from 86% in 1990/91 to 81% in 2000/01.

Grants, contributions and other transfers to artists and cultural organizations, the other major category of spending, totalled $576.7 million in 2000/01, up 2.4% from the previous year. Their share of the total federal cultural budget increased from 14% in 1990/91 to 19% in 2000/01.

Federal grants and contributions for many of these cultural activities, such as museums, national parks and broadcasting, fell in 2000/01. However, grants to literary arts were up 27.2% to $132.2 million. This was largely due to the $26.5 million in federal aid given to the newly established Canada Magazine Fund to assist periodical publishers.

Federal outlays have remained concentrated in culture-based industries, followed by heritage and the arts.

Industries such as broadcasting, film and video production, book and periodical publishing and the sound recording industry consumed $2 billion, or two-thirds of the federal cultural budget. Broadcasting has taken the lion’s share, averaging three-quarters of federal spending on these industries over the last decade.

Federal spending on culture industries increased most strongly in Quebec (+12.2%) and Newfoundland and Labrador (+11.0%) from 1999/2000 to 2000/01.

Broadcasting contributed significantly to spending growth on these industries in Quebec. The film and video sector was wholly responsible for increased industry spending in Newfoundland and Labrador.

Federal spending on heritage activities, including museums, archives, national parks and historic sites, amounted to $709.5 million in 2000/01, up 11%. Increased spending on national parks in Alberta and British Columbia was responsible for about two-thirds of this growth.

Federal spending on the arts, which include arts education, performing arts and visual arts and crafts, totalled $150.6 million in 2000/01, up 5%. Support for the performing arts accounted for most of the growth.

Almost two-thirds of provincial/ territorial spending directed to artists and institutions

In contrast to the federal government, provinces and territories disbursed 63% of their cultural budget in grants and contributions. Artists, organizations and institutions received $1.3 billion in 2000/01.

Provinces and territories also spent $774.2 million on operating needs and capital projects, up 4.5% from the previous year. This accounted for 37% of their cultural budget.

Gains in spending on culture varied widely from province to province. Above-average spending increases were reported by Alberta (+37.8%), Quebec

(+11.4%), Yukon (+9.1%) and New Brunswick (+5.5%). Nearly three-fifths of the growth in spending in Alberta was attributable to the heritage sector.

The largest decline in spending was reported by Nova Scotia (-11.4%), followed by Newfoundland and Labrador (-10.7%), Manitoba (-5.9%), Northwest Territories (-5.3%), and Ontario (-4.9%).

Libraries received $777.3 million, nearly two-fifths of total provincial/territorial spending. The proportion of culture budgets spent by provinces and territories on libraries ranged widely, from 52% in British Columbia to 18% in Yukon.

Heritage consumed $540.2 million or one-quarter of the total provincial/territorial cultural budget. The proportion of spending on heritage ranged from about three-fifths of the total cultural budget in Yukon to about 14% in British Columbia.

Provincial and territorial outlays on the arts amounted to $307 million. Quebec alone accounted for about three-fifths of this amount. One dollar in every four of Quebec's total cultural budget went to the arts.

Municipal cultural spending advances

The growth in municipal cultural spending in 2000 followed the upward trend during most of the last 15 years.

Spending on libraries dominated municipal cultural budgets, accounting for about $1.3 billion or three-quarters of the total municipal cultural budget.

Municipal cultural spending fell in Newfoundland and Labrador, British Columbia, Yukon and the Northwest Territories. All other provinces and territories reported growth.

Definitions, data sources and methods: survey numbers, including related surveys, 3116 and 3117.

Selected data from the survey are now available in table format in *Government expenditures on culture* (87F0001XDB, $50). See *How to order products*. Data from this survey are also available by province and territory. Special tabulations are available on a cost-recovery basis.

For general information, or to order special or standard tables, contact Client Services (1-800-307-3382; *cult.tourstats@statcan.ca*).

To enquire about the concepts, methods or data quality of this release, contact Norman Verma (613-951-6863; fax: 613-951-1333; *norman.verma@statcan.ca*), Culture, Tourism and the Centre for Education Statistics. ■

OTHER RELEASES

Energy consumption estimates for manufacturing industries
1990

Estimates for the industrial consumption of energy on a North American Industrial Classification System (NAICS) basis for the 1990 reference year are now available.

In 1990, 6,299,000 terajoules of fuel and electricity were consumed in Canada. Of this amount, 37% or 2,342,128 terajoules were consumed by the Canadian manufacturing sector as fuel in the production of goods. (1,000 terajoules roughly equals the amount of energy required to operate the Montreal subway system for one year.) Manufacturers have improved their energy intensity since 1990. From 1990 to 2002, energy use by manufacturing establishments increased 10% to 2,587,881 terajoules while manufacturing gross domestic product (GDP) went up 40%, from $117.6 billion in 1990 to $164.7 billion in 2002.

Energy consumption in the manufacturing industry was concentrated in the wood, paper, petroleum and coal products, chemical and chemical product, and primary metal industries. In 1990, these industries were responsible for 33% of GDP and accounted for 82% of total manufacturing energy consumption; in 2002, these same industries accounted for 28% of GDP and 83% of energy consumption.

In 1990 Canada was in the middle of economic downturn. Several factors had an impact on energy use in the manufacturing sector. Labour disputes dampened output and by implication lowered energy use in the steel and chemical industries, while a sagging construction sector reduced the demand for wood and wood products.

Note: 1990 is a pivotal year for climate change benchmarks of the Kyoto Accord. This release of the 1990 industrial consumption of energy estimates on a new NAICS basis permits users to compare and analyse more recent trends and events with common classification structures. Previously, the 1990 estimates were only available on a 1980 Standard Industrial Classification (SIC80) basis.

These historical estimates are part of the NAICS Conversion Project, a project sponsored by Natural Resources Canada and Environment Canada, which converted energy consumption data from the Industrial Consumption of Energy Survey from an SIC80 basis to a NAICS basis for 1990 and the 1995–2000 period inclusively. This project is one initiative undertaken by government lead departments and part of an international effort to address the issues of global warming. Estimates for the 1995–2000 period were released in December 2002. The release of the 1990 estimates completes the time series outlined in this project.

Definitions, data sources and methods: survey numbers, including related surveys, 2103, 2148, 2149, 2150, 2151, 2148, 2193, 2198, 2166, 2167 and 5047.

To order data or a copy of *A summary of the methodological development of the 1990 energy consumption estimates for manufacturing industries on a NAICS basis*, contact the dissemination officer (1-866-873-8789; 613-951-9497; *energ@statcan.ca*). For more information, or to enquire about the concepts, methods or data quality of this release, contact Debbie Hills (613-951-9496; *debbie.hills@statcan.ca*), Manufacturing, Construction and Energy Division. □

Energy consumption by manufacturing industries

	1990	2002	1990 to 2002
	Terajoules[1]		% change
Total manufacturing	**2,342,129**	**2,587,881**	**10**
Food manufacturing	83,860	90,459	8
Beverage and tobacco product manufacturing	12,401	13,245	7
Textile mills	13,946	8,947	-36
Textile product mills	6,823	4,798	-30
Clothing manufacturing	5,995	5,108	-15
Leather and allied product manufacturing	1,406	1,171	-17
Wood product manufacturing	107,715	137,174	27
Paper manufacturing	816,516	831,105	2
Printing and related support activities	10,860	10,316	-05
Petroleum and coal products manufacturing	309,051	364,380	18
Chemical manufacturing	262,722	266,226	1
Plastics and rubber products manufacturing	25,454	44,511	75
Non-metallic mineral product manufacturing	123,874	118,540	-4
Primary metal manufacturing	436,052	538,953	24
Fabricated metal product manufacturing	37,390	47,239	26
Machinery manufacturing	12,244	15,928	30
Computer and electronic product manufacturing	4,628	4,431	-4
Electrical equipment, appliance and component manufacturing	8,601	6,203	-28
Transportation equipment manufacturing	51,084	59,849	17
Furniture and related product manufacturing	6,779	11,533	70
Miscellaneous manufacturing	4,726	7,766	64

1 *1,000 terajoules roughly equals the amount of energy required to operate the Montreal subway system for one year.*

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Steel primary forms — weekly data

Week ending July 26, 2003 (preliminary)

Steel primary forms production for the week ending July 26 totalled 292 823 metric tonnes, up 14.3% from 256 112 tonnes a week earlier and 2.1% from 286 795 tonnes in the same week of 2002.

The year-to-date total as of July 26 was 8 994 575 tonnes, down 3.7% from 9 341 809 tonnes in the same period of 2002.

Definitions, data sources and methods: survey number 2131.

For more information, or to enquire about the concepts, methods or data quality of this release, contact the dissemination officer (1-866-873-8789; 613-951-9497; *manufact@statcan.ca*), Manufacturing, Construction and Energy Division. ■

NEW PRODUCTS

Infomat — a weekly review, August 1, 2003
Catalogue number 11-002-XIE ($3/$109).

Infomat — a weekly review, August 1, 2003
Catalogue number 11-002-XPE ($4/$145).

Canadian Foreign Post Indexes, August 2003
Catalogue number 62-013-XIE
(free).

Canadian international merchandise trade,
May 2003, Vol. 57, no. 5
Catalogue number 65-001-XIB ($14/$141).

Government expenditures on culture, 2000–2001
Catalogue number 87F0001XDB ($50).

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 or –XDE are electronic versions on diskette and -XCB or –XCE are electronic versions on compact disc.

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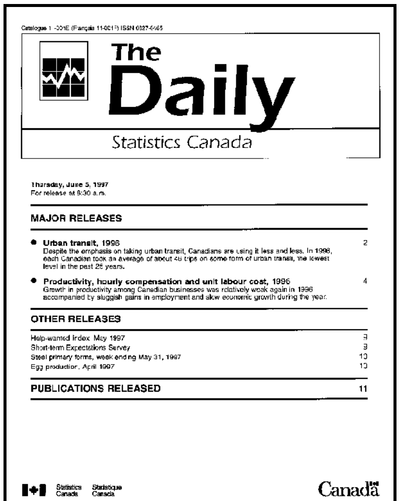
Catalogue 11-001E (Français 11-001F) ISSN 0827-0465

The Daily

Statistics Canada

Thursday, June 5, 1997
For release at 8:30 a.m.

MAJOR RELEASES

- **Urban transit, 1996** 2
  Despite the emphasis on taking urban transit, Canadians are using it less and less. In 1996, each Canadian took an average of about 46 trips on some form of urban transit, the lowest level in the past 25 years.
- **Productivity, hourly compensation and unit labour cost, 1996** 4
  Growth in productivity among Canadian businesses was relatively weak again in 1996 accompanied by sluggish gains in employment and slow economic growth during the year.

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Statistics Canada Statistique Canada

Canada

Statistics Canada's official release bulletin

Catalogue 11-001-XIE.

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

To access *The Daily* on the Internet, visit our site at *http://www.statcan.ca*. To receive *The Daily* each morning by e-mail, send an e-mail message to *listproc@statcan.ca.* Leave the subject line blank. In the body of the message, type "subscribe daily firstname lastname".

RELEASE DATES: AUGUST 5 TO 8

(Release dates are subject to change.)

Release date	Title	Reference period
5	**Building permits**	June 2003
8	**Labour Force Survey**	July 2003

Catalogue 11-001-XIE (Français 11-001-XIF) ISSN 0827-0465

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Mineral wool including fibrous glass insulation	June 2003	July 22, 2003
Monthly railway carloadings	May 2003	July 29, 2003
Monthly Survey of Large Retailers	May 2003	July 18, 2003
Monthly Survey of Manufacturing	May 2003	July 16, 2003
Multifactor productivity	2002	July 10, 2003
Natural gas liquids and liquefied petroleum gases	February 2003	July 28, 2003
Natural gas sales	May 2003	July 22, 2003
New Housing Price Index	May 2003	July 10, 2003
New motor vehicle sales	May 2003	July 14, 2003
Non-store retailers	2001	July 25, 2003
Participation and Activity Limitation Survey: Children with disabilities	2001	July 29, 2003
Particleboard, oriented strandboard and fibreboard	May 2003	July 31, 2003
Paths to post-secondary education among 20-year-olds		July 4, 2003
Perspectives on labour and income	July 2003 online edition	July 23, 2003
Pipeline transportation of crude oil and refined petroleum products	December 2002	July 8, 2003
Placement of hatchery chicks and turkey poults	June 2003	July 25, 2003
Postal code conversion file	January 2003	July 22, 2003
Primary iron and steel	May 2003	July 23, 2003
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	February 2003	July 23, 2003
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