



# The Daily

Statistics Canada

Thursday, January 15, 2004

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## MAJOR RELEASES

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- **New motor vehicle sales, November 2003**

A steep drop in truck sales in November caused overall sales of new motor vehicles to fall 3.2% from October. This decline was the fourth in a row, making for the longest string of monthly declines in more than twenty years.

2
  
- **Investment in non-residential building construction, fourth quarter 2003 and annual 2003**

Investment in non-residential building construction remained virtually unchanged in the fourth quarter (-0.3%), following the record level achieved in the previous quarter (\$6.6 billion). This excellent result, combined with the previous highs established during the first three quarters, produced a total annual investment in 2003 of \$26.0 billion, an increase of 5.7% from 2002.

5

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## OTHER RELEASES

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- Annual Survey of Accounting and Bookkeeping Services, 2002 8
- Domestic and international marine transport, 2002 8
- Dairy statistics, November 2003 9
- Steel primary forms — weekly data, week ending January 3, 2004 9

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## NEW PRODUCTS

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10


## MAJOR RELEASES

### New motor vehicle sales

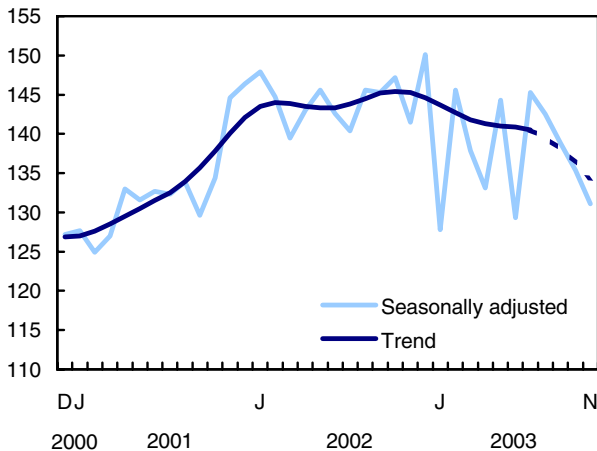
November 2003

A steep drop in truck sales in November caused overall sales of new motor vehicles to fall 3.2% from October. In all, 131,085 new motor vehicles were sold in November, down 4,327 units from October. Trucks include minivans, sport-utility vehicles, light and heavy trucks, vans and buses.

The decline was the fourth in a row, making for the longest string of sales declines in more than twenty years. New motor vehicle sales have shown major fluctuations since the start of 2003, resulting in a downward trend that has gained momentum in recent months. New motor vehicle sales had remained at record levels throughout 2002, following a period of sustained growth in 2001.

#### New motor vehicle sales continued to decline in November

'000 units



The last few trend points could be subject to revisions when more data are added. This is indicated by the dashed line.

November's drop in sales occurred despite incentives and fairly bright economic prospects. It should be noted that the consumer price index for motor vehicles rose 4.0% in November, as the prices of 2004 models were reflected in the index.

On the basis of preliminary figures from the auto industry, the number of new motor vehicles sold in December is estimated to have dropped again, by

#### Note to readers

All data in this release are seasonally adjusted. Seasonally adjusted provincial data dating back to January 1991 are available on CANSIM.

Passenger cars include those used for personal and commercial purposes, such as taxis or rental cars. Trucks include minivans, sport-utility vehicles, light and heavy trucks, vans and buses.

North American-built motor vehicles include vehicles manufactured or assembled in Canada, the United States or Mexico. All other new motor vehicles are considered to have been manufactured overseas.

For reasons of confidentiality, data for Yukon, the Northwest Territories and Nunavut are included with those of British Columbia.

approximately 9%. Both trucks and passenger cars contributed to this decrease.

The number of new vehicles sold in November is at the third lowest level since the start of the year. Sales in the first 11 months of 2003 were 4.5% lower than in the same period of 2002, with the gap widening compared with that record year. However, these cumulative sales were higher than sales of the same period in 2001 and in preceding years.

#### Truck sales down while car sales almost unchanged

In November, 60,776 new trucks were purchased, down 6.9% from October. This was the fourth straight monthly decline. With November's drop, truck sales were down 14.6% from the peak reached in July.

The number of new passenger cars sold in November was almost unchanged (+0.2%) from October at 70,308 units. November's sales followed two consecutive declines in October (-1.5%) and September (-4.3%). The slight gain registered in November was entirely attributable to sales of North American-built passenger cars (+1.9%), whereas sales of overseas-built cars declined (-3.9%).

Sales of new passenger cars have been following a downward trend since the fall of 2002, while truck sales have not experienced the same slowdown, except in recent months. Previously, sales of both categories had remained generally stable during 2002, following an upward trend that began in early 2001.

#### Sales down in almost all provinces

In November, new motor vehicle sales declined in all provinces except the region formed by British

Columbia and the territories, where sales rose 1.0%, following three monthly drops in a row.

The sharpest declines were recorded in Prince Edward Island (-11.3%) and Saskatchewan (-10.8%). Ontario (-4.5%) was the other province to register a decline greater than the national average (-3.2%). The other provinces posted decreases below the national average.

Sales in British Columbia and the territories appear to have stabilized in recent months, following a period of gains going back to the spring of 2003. Previously, sales had followed a downward movement that began in the summer of 2002.

**Available on CANSIM: tables 079-0001 and 079-0002.**

**Definitions, data sources and methods: survey number 2402.**

The November 2003 issue of *New Motor Vehicle Sales* (63-007-XIB, \$13/\$124) will be available soon. See *How to order products*.

Data on new motor vehicle sales for December 2003 will be released on February 12.

For general information or to order data, contact Client Services (1-877-421-3067; 613-951-3549; [retailinfo@statcan.ca](mailto:retailinfo@statcan.ca)). To enquire about the concepts, methods or data quality of this release, contact Clérance Kimanyi (613-951-6363), Distributive Trades Division.

□

**New motor vehicle sales**

|                               | November<br>2002   | October<br>2003 <sup>r</sup> | November<br>2003 <sup>p</sup> | November<br>2002<br>to<br>November<br>2003 | October<br>to<br>November<br>2003 |
|-------------------------------|--------------------|------------------------------|-------------------------------|--|-----------------------------------|
| seasonally adjusted           |                    |                              |                               |  |                                   |
|                               | number of vehicles |                              |                               | % change                                   |                                   |
| <b>New motor vehicles</b>     | <b>141,460</b>     | <b>135,412</b>               | <b>131,085</b>                | <b>-7.3</b>                                | <b>-3.2</b>                       |
| Passenger cars                | 73,309             | 70,137                       | 70,308                        | -4.1                                       | 0.2                               |
| North American <sup>1</sup>   | 49,431             | 49,633                       | 50,598                        | 2.4  | 1.9                               |
| Overseas                      | 23,877             | 20,504                       | 19,711                        | -17.4                                      | -3.9                              |
| Trucks, vans and buses        | 68,151             | 65,274                       | 60,776                        | -10.8                                      | -6.9                              |
| <b>New motor vehicles</b>     |                    |                              |                               |  |                                   |
| Newfoundland and Labrador     | 2,122              | 2,042                        | 2,005                         | -5.5                                       | -1.8                              |
| Prince Edward Island          | 427                | 424                          | 376                           | -11.9                                      | -11.3                             |
| Nova Scotia                   | 3,979              | 4,020                        | 3,893                         | -2.2                                       | -3.2                              |
| New Brunswick                 | 3,005              | 3,044                        | 2,995                         | -0.3                                       | -1.6                              |
| Quebec                        | 35,910             | 34,870                       | 33,869                        | -5.7                                       | -2.9                              |
| Ontario                       | 55,545             | 52,064                       | 49,703                        | -10.5                                      | -4.5                              |
| Manitoba                      | 4,083              | 3,793                        | 3,679                         | -9.9                                       | -3.0                              |
| Saskatchewan                  | 3,398              | 3,515                        | 3,134                         | -7.8                                       | -10.8                             |
| Alberta                       | 16,994             | 16,351                       | 15,993                        | -5.9                                       | -2.2                              |
| British Columbia <sup>2</sup> | 15,997             | 15,289                       | 15,437                        | -3.5                                       | 1.0                               |
|                               | November 2002      | October 2003                 | November 2003 <sup>p</sup>    | November 2002 to<br>November 2003          |                                   |
| unadjusted                    |                    |                              |                               |  |                                   |
|                               | number of vehicles |                              |                               | % change                                   |                                   |
| <b>New motor vehicles</b>     | <b>127,244</b>     | <b>124,427</b>               | <b>115,133</b>                | <b>-9.5</b>                                |                                   |
| Passenger cars                | 64,350             | 65,226                       | 60,556                        | -5.9                                       |                                   |
| North American <sup>1</sup>   | 44,232             | 44,518                       | 44,653                        | 1.0  |                                   |
| Overseas                      | 20,118             | 20,708                       | 15,903                        | -21.0                                      |                                   |
| Trucks, vans and buses        | 62,894             | 59,201                       | 54,577                        | -13.2                                      |                                   |
| <b>New motor vehicles</b>     |                    |                              |                               |  |                                   |
| Newfoundland and Labrador     | 1,578              | 1,655                        | 1,480                         | -6.2                                       |                                   |
| Prince Edward Island          | 357                | 377                          | 300                           | -16.0                                      |                                   |
| Nova Scotia                   | 3,163              | 3,363                        | 3,127                         | -1.1                                       |                                   |
| New Brunswick                 | 2,527              | 2,514                        | 2,378                         | -5.9                                       |                                   |
| Quebec                        | 29,330             | 31,122                       | 26,567                        | -9.4                                       |                                   |
| Ontario                       | 52,066             | 49,181                       | 45,162                        | -13.3                                      |                                   |
| Manitoba                      | 3,804              | 3,558                        | 3,295                         | -13.4                                      |                                   |
| Saskatchewan                  | 3,215              | 3,299                        | 2,823                         | -12.2                                      |                                   |
| Alberta                       | 16,647             | 15,574                       | 15,612                        | -6.2                                       |                                   |
| British Columbia <sup>2</sup> | 14,557             | 13,784                       | 14,389                        | -1.2                                       |                                   |

<sup>r</sup> Revised figures.

<sup>p</sup> Preliminary figures.

<sup>1</sup> Manufactured or assembled in Canada, the United States or Mexico.

<sup>2</sup> Includes Yukon, the Northwest Territories and Nunavut.



## Investment in non-residential building construction

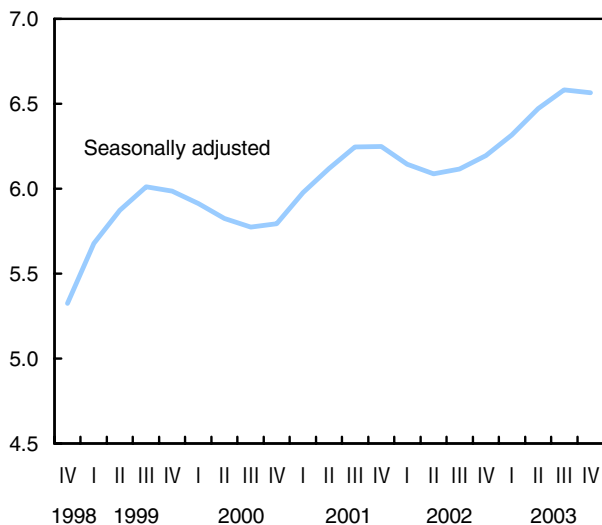
Fourth quarter 2003 and annual 2003

Investment in non-residential building construction remained virtually unchanged in the fourth quarter (-0.3%) following the record level achieved in the previous quarter (\$6.6 billion). This excellent result, combined with the previous highs established during the first three quarters, produced a total annual investment in 2003 of \$26.0 billion, an increase of 5.7% from 2002.

In the fourth quarter, governments continued to pump additional funds into the sector (+2.8% to \$2.4 billion) while businesses reduced their expenditures (-1.9% to \$4.2 billion). Investment in industrial buildings ended the fourth quarter down 1.7% to \$1.2 billion, while investments in commercial building construction fell 2.0% to \$3.0 billion.

### Investments for non-residential construction building remain stable

\$ billions



Investment in non-residential building construction rose in six provinces and territories in the fourth

#### Note to readers

Starting with January 2001, major revisions of the data were made as a result of additional information previously unavailable from the city of Toronto. Both raw and seasonally adjusted data were revised.

This release presents seasonally adjusted data (unless otherwise stated), which ease comparisons by removing the effects of seasonal variations.

Investments in non-residential building construction exclude engineering construction. This series is based on the Building Permits Survey of municipalities, which collects information on construction intentions.

Work put in place patterns are assigned to each type of structure (industrial, commercial and institutional). These work patterns are used to distribute the value of building permits according to project length. Work put in place patterns differ according to the value of the construction project; a project worth several million dollars will usually take longer to complete than will a project of some hundred thousand dollars.

Additional data from the Survey of Private and Public Investment are used to create this investment series. Investment in non-residential building data is benchmarked to Statistics Canada's System of National Accounts of non-residential building investment series.

quarter. In dollars, Saskatchewan led the way with a growth of 10.7% to \$210 million. Quebec, for its part, experienced the strongest decline (-1.0% to \$1.4 billion).

Investment in non-residential building construction rose in 11 of the 28 census metropolitan areas. Toronto experienced the strongest growth (+7.6% to \$1.3 billion), while Ottawa saw the greatest drop (-8.6% to \$271 million) as a result of the combined decline in the three components.

The non-residential construction industry had a stellar year in 2003. Annual growth of 5.7% is evidence of the strength of the sector during all four quarters. These results reflect the revised growth forecast for 2003 for construction investment published by the Survey of Private and Public Investment. The Labour Force Survey also recorded high levels of activity in the construction industry in terms of the number of jobs and hours worked.

### Investment in non-residential building construction

|                        | Fourth quarter<br>2002 | Third quarter<br>2003 | Fourth quarter<br>2003 | Third quarter<br>to<br>fourth<br>quarter<br>2003 |
|------------------------|------------------------|-----------------------|------------------------|--|
| seasonally adjusted    |                        |                       |                        |  |
|                        | \$ millions            |                       |                        | % change   |
| <b>Total</b>           | <b>4,437</b>           | <b>4,795</b>          | <b>4,792</b>           | <b>-0.1</b>                                      |
| Abbotsford             | 31                     | 18                    | 16                     | -14.2  |
| Calgary                | 232                    | 269                   | 273                    | 1.4  |
| Edmonton               | 190                    | 161                   | 159                    | -0.7   |
| Gatineau               | 56                     | 69                    | 62                     | -9.4   |
| Halifax                | 31                     | 69                    | 70                     | 1.4  |
| Hamilton               | 129                    | 182                   | 180                    | -1.1   |
| Kingston               | 38                     | 42                    | 40                     | -4.0   |
| Kitchener              | 157                    | 133                   | 109                    | -18.4  |
| London                 | 150                    | 172                   | 162                    | -6.0   |
| Montréal               | 817                    | 770                   | 784                    | 1.7  |
| Oshawa                 | 70                     | 107                   | 119                    | 10.5   |
| Ottawa                 | 268                    | 297                   | 271                    | -8.6   |
| Québec                 | 145                    | 145                   | 123                    | -14.6  |
| Regina                 | 42                     | 63                    | 71                     | 13.5   |
| Saguenay               | 30                     | 30                    | 27                     | -10.1  |
| Saint John             | 13                     | 18                    | 15                     | -14.2  |
| Saskatoon              | 65                     | 58                    | 58                     | -0.6   |
| Sherbrooke             | 35                     | 27                    | 31                     | 13.3   |
| St. Catharines-Niagara | 119                    | 92                    | 83                     | -10.0  |
| St. John's             | 39                     | 60                    | 54                     | -9.7   |
| Sudbury                | 52                     | 32                    | 35                     | 10.5   |
| Thunder Bay            | 62                     | 35                    | 27                     | -20.8  |
| Toronto                | 972                    | 1,186                 | 1,277                  | 7.6  |
| Trois-Rivières         | 34                     | 38                    | 44                     | 17.7   |
| Vancouver              | 340                    | 325                   | 307                    | -5.5   |
| Victoria               | 51                     | 55                    | 60                     | 7.8  |
| Windsor                | 98                     | 104                   | 100                    | -4.5   |
| Winnipeg               | 85                     | 139                   | 145                    | 4.2  |

### Record levels for institutional investment

Investment in institutional building construction ended the year on a very positive note. Governments and their partners invested a record \$2.4 billion in the fourth quarter, propelling the annual total to a high of \$9.1 billion, an increase of 18.9% from 2002.

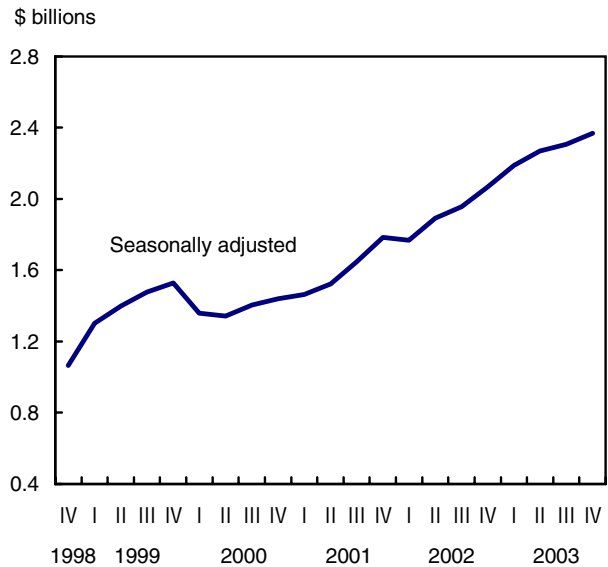
Investment increases in the fourth quarter were shared by seven provinces and territories. Ontario recorded the sharpest rise (+4.8% to \$1.3 billion), establishing a new record. Quebec (-3.6% to \$333 million) and Nova Scotia posted the greatest reductions. The strongest investment came from the construction of educational institutions in Ontario and health care facilities in Alberta.

In terms of the census metropolitan areas, 12 areas recorded increases. The Toronto agglomeration posted the greatest increase (+13.0% to \$548 million). In contrast, Kitchener saw its level of investment fall 18.4% to \$45 million. This drop is due mainly to the work progress on a large regional hospital.

Overall, the institutional component experienced significant investment growth in 2003 in educational

institutions in Ontario. The province responded to new demands from two directions, specifically, from the double cohort and from demand directly linked to its growing demographics.

### Exceptional development for the investment in institutional construction



### Manufacturing plant construction strengthens investment in industrial buildings

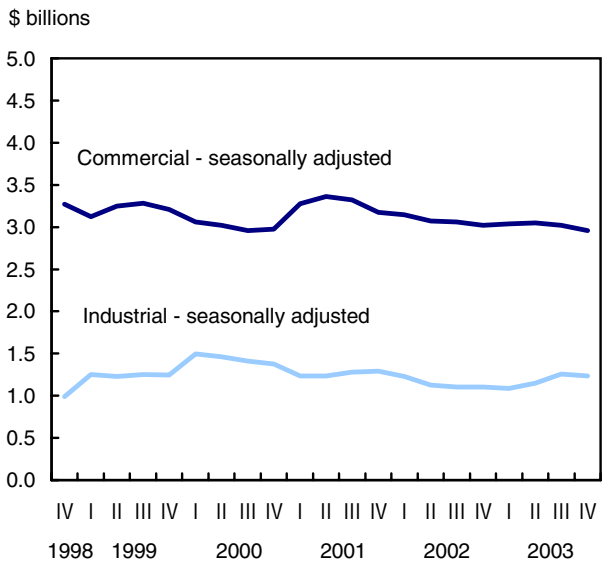
The substantial rises in industrial building investment during the second and third quarters have more than offset the drop of 1.7% recorded in the fourth quarter to bring the annual level to \$4.7 billion, an increase of 3.8% over 2002.

The greatest decline in the fourth quarter occurred in Ontario, where investment fell 4.9% to \$537 million. Newfoundland and Labrador (+26.1% to \$81 million) and Nova Scotia recorded the greatest increased investment in industrial building construction.

Increases were experienced in 13 of 28 census metropolitan areas. Toronto led the way for the fourth consecutive quarter with growth of 4.1% to \$217 million. The Kitchener area saw its investment fall 41.8% to \$19 million.

In 2003, after two consecutive years of declines, investment in buildings in the primary and manufacturing sectors in Ontario has resulted in an annual growth in industrial building investment.

**Businesses have reduced their spending in the fourth quarter**



**Commercial building construction affected by office building vacancy rates**

Investment in commercial building construction slowed (-2.0%) in the fourth quarter, the result of a decline in expenditures in office building and hotel and motel construction. Encouraging upward signs during the first half of the year were unable to offset subsequent reductions leading to an overall annual decline of 1.9% to \$12.1 billion.

Investment in commercial construction rose 18.4% in Saskatchewan to \$81 million, which was the strongest increase in investment dollars. In contrast, Ontario (-3.6% to \$1.1 billion) experienced the sharpest drop in investment.

Of the census metropolitan areas, Toronto (+3.9% to \$512 million) and Montréal recorded the strongest growth. In contrast, Calgary (-12.9% to \$157 millions) saw the sharpest decline.

Investment in office building construction has experienced a substantial slowdown in recent years. During this period, vacancy rates have risen in most

major metropolitan areas, varying by building classes. The proportion held by office buildings in the commercial component fell 8% from 2000 to 2003, so that they now represent only 37.5% of investments. In the past year, the provinces most affected by this trend were Quebec, Ontario and British Columbia, especially their main metropolitan areas of Montréal, Toronto and Vancouver.

**Investment in non-residential building construction**

|                           | Fourth quarter 2002 | Third quarter 2003 | Fourth quarter 2003 | Third quarter to fourth quarter 2003 |
|---------------------------|---------------------|--------------------|---------------------|--------------------------------------|
| seasonally adjusted       |                     |                    |                     |                                      |
|                           | \$ millions         |                    |                     | % change                             |
| <b>Canada</b>             | <b>6,195</b>        | <b>6,582</b>       | <b>6,565</b>        | <b>-0.3</b>                          |
| Newfoundland and Labrador | 85                  | 137                | 146                 | 6.3                                  |
| Prince Edward Island      | 41                  | 34                 | 26                  | -24.0                                |
| Nova Scotia               | 134                 | 144                | 147                 | 2.6                                  |
| New Brunswick             | 102                 | 110                | 110                 | 0.0                                  |
| Quebec                    | 1,427               | 1,436              | 1,422               | -1.0                                 |
| Ontario                   | 2,689               | 2,970              | 2,964               | -0.2                                 |
| Manitoba                  | 197                 | 248                | 236                 | -4.6                                 |
| Saskatchewan              | 177                 | 190                | 210                 | 10.7                                 |
| Alberta                   | 719                 | 708                | 702                 | -0.8                                 |
| British Columbia          | 587                 | 554                | 543                 | -2.0                                 |
| Yukon                     | 5                   | 14                 | 10                  | -29.6                                |
| Northwest Territories     | 21                  | 18                 | 18                  | 1.1                                  |
| Nunavut                   | 11                  | 19                 | 31                  | 63.8                                 |

Available on CANSIM: table 026-0016.

**Definitions, data sources and methods: survey number 5014.**

More detailed data on investment in non-residential building construction are also available in free tables online. From the *Canadian statistics* page, choose *Latest indicators*, then *Construction*.

Data on investment in non-residential building construction for the first quarter of 2004 will be released on April 13.

To order data, contact Patrick Lemire (613-951-6321; [bdp\\_information@statcan.ca](mailto:bdp_information@statcan.ca)). For more information, or to enquire about the concepts, methods or data quality of this release, contact Michel Labonté (613-951-9690), Investment and Capital Stock Division. ■

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## OTHER RELEASES

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### Annual Survey of Accounting and Bookkeeping Services 2002

The year 2002 proved difficult for the accounting industry, as negative publicity caused by the Enron and WorldCom scandals resulted in the dissolution of a major professional accounting firm and the introduction of more restrictive accounting industry standards. After many years of consistent growth, these events caused the industry to contract in 2002.

The accounting and bookkeeping industry posted its first year of negative growth, as revenues declined for the first time in the industry's recent history. Total operating revenues dipped below the \$8 billion dollar mark to finish off the year. Revenues dropped 3% from 2001 to \$7.92 billion. This decrease was due, in part, to the organizational restructuring that took place in 2002. Multi-disciplinary firms refocused on traditional accounting and auditing services. Public accounting firms spun off their consulting and legal services into separate entities in order to eliminate the appearance of conflicts of interest.

In terms of the services offered within the industry, consulting activities saw a dramatic decline in 2002. Consulting activities dropped significantly from 15% of total revenues in 2001 to 7% in 2002. Traditional accounting and auditing services remain the backbone of the profession. Services in this area increased 4 percentage points overall from 2001, as it continues to be the major service, representing 59% of total revenues. Both corporate and individual tax services continue to provide a consistent source of revenue for the industry. Tax services represented 25% of revenues in 2002, an increase of 2 percentage points from 2001.

Accounting firms operating in Ontario had a market share of 47%, followed by those in Quebec (18%), British Columbia (16%) and Alberta (11%). Ontario, British Columbia and Alberta posted declining revenues, while Quebec posted a remarkable 5% growth in revenues from 2001.

The accounting industry relies heavily on a high concentration of human capital. The industry employed approximately 61,000 paid employees in 2002. These figures do not include the contribution of the partners and proprietors working in the industry.

Despite declining revenues, the industry continues to be profitable. The industry's pre-tax operating profit margin was 30.0% in 2002, a slight increase from 28.9% in 2001. Spending on salaries and wages

dropped 6% to \$3.05 billion. Salaries remain the single largest expense item, comprising 55% of total industry operating expenses.

Market share of the 20 largest firms represented 48% of operating revenues in 2002, virtually unchanged from 2001.

**Available on CANSIM: table 360-0007.**

**Definitions, data sources and methods: survey number 4716.**

Results from the 2002 Survey of Accounting and Bookkeeping Services are now available. Detailed tables at the provincial level for a range of industry characteristics providing a breakdown of revenues and expenses are also included in the data release package.

To order a free copy of the data release package, or to enquire about the concepts, methods or data quality of this release, contact Nissa Kenney (613-951-5250; fax: 613-951-6696; [nissa.kenney@statcan.ca](mailto:nissa.kenney@statcan.ca)), Service Industries Division. ■

### Domestic and international marine transport 2002

The total tonnage of cargo handled by Canadian ports and marine terminals in 2002 increased 3.5% from 2001 to 408.5 million metric tonnes. International cargo (between Canadian and foreign ports) declined 1.2% from 286.9 million tonnes in 2001 to 283.4 million tonnes in 2002. The years 2001 and 2002 were the first time that international shipping activity declined two years in a row in over ten years. Domestic cargo (between two Canadian ports) increased 16.0% from 107.8 million tonnes to 125.1 million tonnes. The increased production of the Newfoundland offshore oil fields in 2002 drove the increase in the domestic shipping sector.

**Definitions, data sources and methods: survey numbers, including related surveys, 2751 and 2791.**

For more information, or to enquire about the concepts, methods or data quality of this release, contact Jean-Robert Larocque (1-866-500-8400; fax: 613-951-0009; [transportationstatistics@statcan.ca](mailto:transportationstatistics@statcan.ca)), Transportation Division. ■



## **Dairy statistics**

November 2003 (preliminary)

Consumers purchased 247 000 kilolitres of milk and cream in November, up 2% from November 2002. Sales of milk increased 1% from year-ago levels to 227 000 kilolitres. Sales of cream rose to 20 000 kilolitres, up 10% from November 2002.

**Definitions, data sources and methods: survey numbers, including related surveys, 3430, 3431 and 3432.**

The fourth quarter 2003 issue of *The Dairy Review* (23-001-XIB, \$29/\$96) will be available in February 2004. See *How to order products*.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Anna Michalowska (1-800-465-1991; 613-951-2442; fax: 613-951-3868), Agriculture Division. ■

## **Steel primary forms — weekly data**

Week ending January 3, 2004 (preliminary)

Steel primary forms production for the week ending January 3 totalled 282 420 metric tonnes, up 6.4% from 265 403 tonnes a week earlier and 15.9% from 243 613 tonnes in the same week of 2003.

**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](mailto:manufact@statcan.ca)), Manufacturing, Construction and Energy Division. ■

## NEW PRODUCTS

**Air Carrier Traffic at Canadian Airports, 2001**  
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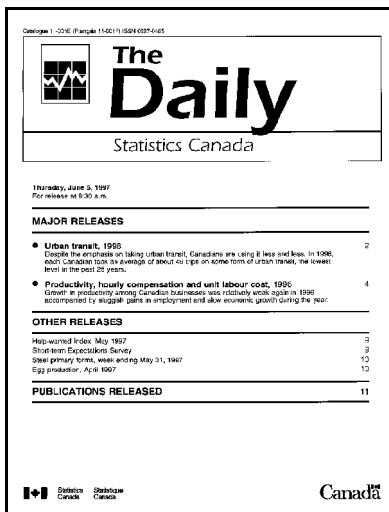
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