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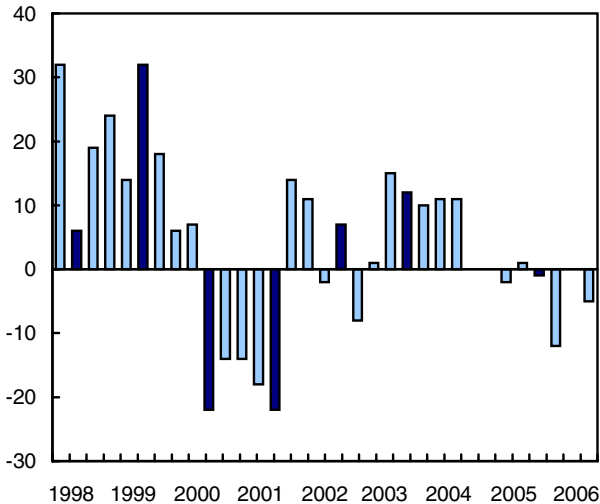
Business Conditions Survey: Manufacturing industries

October 2006

Manufacturers are expecting tougher times ahead according to the October Business Conditions Survey, due mostly to widespread dissatisfaction with current levels of orders. As a result, manufacturers are anticipating decreasing production and employment in the coming three months.

Balance of opinion for expected volume of production for the next three months

Balance of opinion



The Business Conditions Survey is a quarterly survey that requests manufacturers opinions on production impediments, finished product inventory levels, new and unfilled order levels, production and employment prospects in the coming three months. The voluntary survey was conducted in the first two weeks of October and attracted almost 4,000 responses from manufacturers.

Manufacturers less optimistic about production prospects

While 16% of manufacturers stated they would increase production in the fourth quarter of 2006, another 21% expected to decrease production, leaving the balance of opinion at -5. This was a 5 point decrease

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.

from the zero balance posted in the July survey. The drop in production prospects can be attributed to declines in Ontario and Quebec, while most of the other provinces were positive. Although lower than last quarter, the current balance is slightly better than the balance of -12 posted in April of this year. Since October 2004, the production prospects balance of opinion has ranged from -12 to +8.

Lower global demand and factory prices contributed to diminished prospects in some industries, led by producers in the plastics and rubber products, primary metal, wood product and paper industries. In all, 10 of the 21 manufacturing industries contributed to the lowered balance for production prospects in the fourth quarter of 2006.

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

Satisfaction with level of new orders declines

While 10% of manufacturers stated the current level of new orders was increasing, 23% stated the level of new orders was decreasing. As a result, the October balance of opinion dropped 17 points from the July survey, to -13. This was the largest quarter-to-quarter drop in balance since a 28 point decline in the January 2001 survey. The drop in the balance was widespread as 16 of the 21 industries indicated lowered satisfaction with current levels of new orders. Producers in the primary metal, fabricated metal product, plastics and rubber products, wood product and paper industries were the major contributors to the declining balance of opinion for orders received. According to August's Monthly Survey of Manufacturing, new orders for

all manufacturing industries declined 1.1% to just over \$49.5 billion. The current level of new orders was below that of one year earlier (\$50.6 billion).

Manufacturers express greater concern with levels of unfilled orders

The October balance of opinion concerning the current level of unfilled orders stood at -19, a 17 point decrease from the -2 posted in the July survey. Some 24% of manufacturers indicated that the current level of unfilled orders was lower than normal, while 5% claimed a higher than normal backlog. Producers in the primary metal, computer and electronic product, electrical equipment, wood product and paper industries were the major contributors to the falling unfilled orders balance of opinion. The balance of opinion for unfilled orders has not been this low since the -23 observed in April 2005. Overall, a lowered balance of opinion was posted in 17 of the 21 industries. According to August's Monthly Survey of Manufacturing, unfilled orders were down 0.8% to just over \$41.0 billion following two months of minor increases (+0.2% in July and +0.4% in June).

Manufacturers slightly less concerned with finished product inventories

In October, 81% of manufacturers reported that the current level of finished product inventories was about right, down 3 points from July. Some 14% stated that inventories were too high, while 5% said inventories were too low. This left the balance of opinion at -9, a 1 point improvement over the July balance. A year earlier, in the October 2005 survey, the balance of opinion for finished product inventories had stood at -18. According to August's Monthly Survey of Manufacturing, finished product inventories levels stood at almost \$21.7 billion, down 2.3% from over \$22.2 billion posted one year earlier in the August 2005 survey.

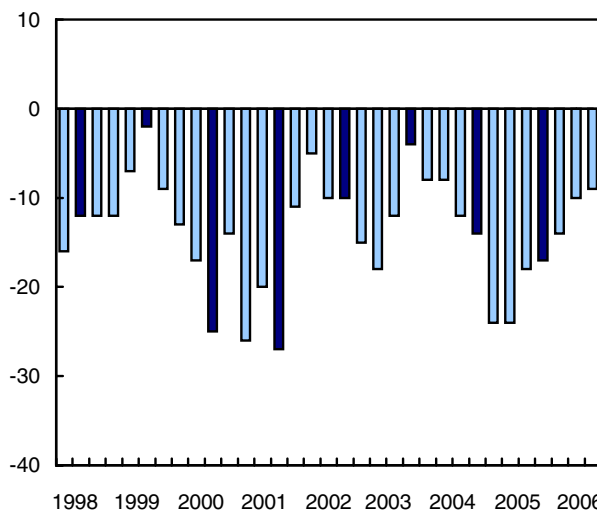
Manufacturers' employment outlook down

The balance of opinion for employment prospects for the next three months decreased 3 points to -5 in October. While 65% of manufacturers stated that they would keep their current work force, 15% indicated they would increase it and 20% indicated that they expected to decrease employment in the fourth quarter of 2006. Regionally, manufacturers expected slightly lower employment levels in Ontario (balance -14) and Quebec (-8), which offset increases in Saskatchewan (+24), Alberta (+21) and British Columbia (+7) where manufacturers continued to express difficulty in finding

skilled labour. According to the September Labour Force Survey, manufacturing employment has declined 3.1% so far in 2006, representing some 67,000 fewer employees.

Balance of opinion for current level of finished-product inventory

Balance of opinion



Manufacturers report more production impediments

The number of manufacturers reporting production impediments increased 5 points to 28% in the October survey. Shortages of orders, the high value of the Canadian dollar and labour shortages in the western provinces were among the factors cited.

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

Definitions, data sources and methods: survey number 2152.

Business Conditions Survey data for January 2007 will be released on January 29, 2007.

For general information or to order data, contact the dissemination officer (toll-free 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; claudio.robillard@statcan.ca), Manufacturing, Construction and Energy Division.

□

**Business Conditions Survey, manufacturing industries: Production prospects
balance of opinion for select industries**

	October 2005	January 2006	April 2006	July 2006	October 2006
Major group industries	Seasonally adjusted				
Non-durable goods	2	-5	-5	15	3
Food	-3	0	6	14	12
Chemical	8	19	-1	17	10
Petroleum and coal products	35	-63	15	54	66
Paper	-6	-1	-2	-2	-13
Plastic and rubber products	8	13	0	5	-26
Durable goods	5	13	-28	-9	-8
Transportation equipment	0	-2	-33	-11	-8
Primary metal	10	25	3	10	-23
Wood products	-9	3	-2	-1	-12
Fabricated metal products	27	3	11	0	-11
Machinery	10	8	3	-9	1
Computer and electronic products	8	-28	12	-6	-16

Business Conditions Survey: Manufacturing industries

	October 2005	January 2006	April 2006	July 2006	October 2006
	Seasonally adjusted				
Volume of production during next three months compared with last three months will be:					
About the same (%)	69	69	58	60	63
Higher (%)	16	15	15	20	16
Lower (%)	15	16	27	20	21
Balance of opinion	1	-1	-12	0	-5
Orders received are:					
About the same (%)	76	70	64	68	67
Rising (%)	14	15	16	18	10
Declining (%)	10	15	20	14	23
Balance of opinion	4	0	-4	4	-13
Present backlog of unfilled orders is:					
About normal (%)	61	65	70	82	71
Higher than normal (%)	19	14	12	8	5
Lower than normal (%)	20	20	18	10	24
Balance of opinion	-1	-6	-6	-2	-19
Finished product inventory on hand is:					
About right (%)	68	75	83	84	81
Too low (%)	7	4	1	3	5
Too high ¹ (%)	25	21	15	13	14
Balance of opinion	-18	-17	-14	-10	-9
Employment during the next three months will:					
Change little (%)	72	73	71	68	65
Increase (%)	13	13	13	15	15
Decrease (%)	15	14	16	17	20
Balance of opinion	-2	-1	-3	-2	-5
Unadjusted					
%					
Sources of production difficulties					
Working capital shortage	3	3	3	2	3
Skilled labour shortage	9	6	8	9	10
Unskilled labour shortage	4	4	4	5	6
Raw material shortage	5	4	4	5	4
Other difficulties	5	3	3	2	4
No difficulties	74	81	79	77	72

1. No evident seasonality.

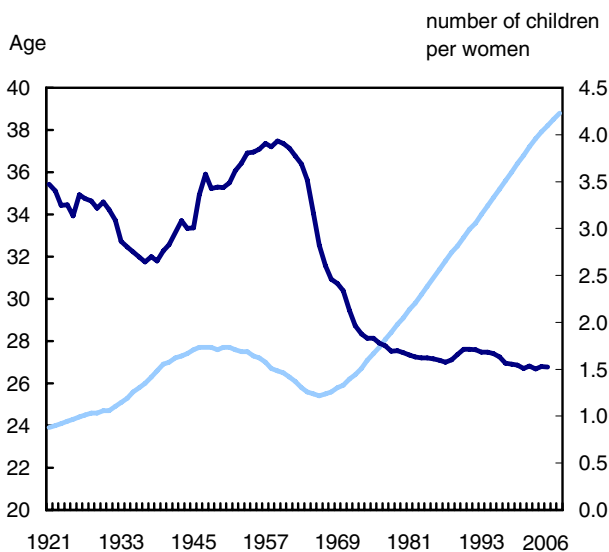


Canada's population by age and sex

As of July 1, 2006

Canada's population keeps getting older, as is the case for almost every other developed nation in the world. As of July 1, 2006, the median age of the population reached a record high of 38.8 years, compared to 38.5 a year before and 37.2 in 2001.

Median age and number of children per woman, 1921 to 2006



Generally speaking, the data showed an east-west split among the provinces in patterns of ageing. The Atlantic provinces and Quebec have an older population with a median age higher than the national level, while Ontario and the western provinces, as well as the territories, have younger populations and a lower median age.

The single exception to this general pattern was British Columbia, where the population was relatively older due to a fertility which has been among the lowest in Canada since the mid-sixties.

The population estimates are based on the 2001 Census, adjusted for net undercoverage, and updated between censuses from migration, fertility and mortality information coming from administrative sources. Data on age and sex from the 2006 Census are scheduled for release during the summer of 2007.

According to medium-growth scenarios of Statistics Canada's most recent demographic projections,

Definitions

Baby-boomers: Population born in the 20 years following World War II (1946-1965) period, marked by a strong increase in fertility and in the number of births.

Median age: The median age is an age "x", such that exactly one half of the population is older than "x" and the other half is younger than "x".

Net undercoverage: The difference between undercoverage and overcoverage.

Overcoverage: Number of persons who should not have been counted in the census or who were counted more than once.

Undercoverage: Number of persons who were intended to have been enumerated in a census but were not enumerated.

Replacement level: Mean number of children per woman necessary to assure the long-term replacement of a population for a given mortality level. Currently, the replacement level for Canadians is around 2.1 children per woman.

released in *The Daily* on December 15, 2005, the median age of the population in 2056 would be 46.9 years.

This year, the oldest of the baby boomers, the generation born during the 1946 to 1965 period, started to turn 60 years old. By the end of the year, more than 400,000 of Canadian boomers, almost 1,100 a day, will have celebrated their 60th birthday.

The ageing of the Canadian population was observed for most of the 20th Century. Temporarily stopped by the baby boom, it continued thereafter under the combined impact of a fertility rate that was below the replacement level and a steady increase in life expectancy.

Net international migration has been the main engine of population growth in Canada since the beginning of the 1990s. However, it has had little impact on the population's age structure. The only way the ageing process can be reversed is through a fertility rate that is permanently above the replacement level.

Among the G8 nations, Canada's median age is the third lowest behind United States and Russia.

Seniors represent growing proportion of the population

These population estimates show that the proportion of seniors aged 65 and over in the population continues to grow.

As of July 1, 2006, seniors accounted for an estimated 13.2% of the country's population, almost double the proportion of 7.2% at the outset of the baby boom in 1946. Meanwhile, the proportion of individuals aged 20 to 64 increased from 56.3% to 62.8%.

At the same time, Canada has undergone a substantial decline in the number of children and young people. As of July 1, 2006, the age group 0 to 19 accounted for less than one-quarter (24.0%) of the population, down from 36.6% in 1946. This decline will continue for the next 50 years. By 2056, it is projected that youth in this age group will represent less than 20% of the population.

The importance of seniors in Canada will accelerate in 2011 and will be exacerbated until 2031, the year when the last of the baby boom generation will reach the age of 65. According to projections, seniors could account for more than one out of every four individuals in the population by 2056.

Ageing process fastest in Atlantic Canada

With a few exceptions, the older populations in Canada are found east of Ontario, while the population west of Quebec and in the territories is younger. While differences are mainly generated by different fertility levels, migration also plays a role.

In the Atlantic region, out-migration of young adults is accelerating an ageing process already fueled by a persistent lower fertility. As of July 1, 2006, all four Atlantic provinces had a population older than the national median. Except for Prince Edward Island, their median age was over 40 years.

The oldest province was Newfoundland and Labrador with a median age of 41.3 years. Between 2001 and 2006, the median rose by 3.2 years, the fastest increase in the country.

Quebec, with a median age of 40.4 years, is the only province outside of the Atlantic region to post a median age higher than 40. This was mainly due to a fertility which had been steadily lower than the rest of the country over the first 25 years following the baby boom. However, the recent increase in fertility, if maintained, could slow the province's ageing process.

Manitoba and Saskatchewan have relatively young populations. A strong Aboriginal presence has helped both provinces maintain higher fertility rates. These have offset important losses of young people through interprovincial migration and, at the same time, slowed the ageing of their population.

Because of a persistent higher fertility and the steady, strong inflow of young Canadians from other parts of the country, Alberta had the youngest population amongst provinces, with a median age of 35.5 years. Between 2001 and 2006, Alberta's median age only went up by 0.8 years, the smallest increase among the provinces.

In British Columbia, the median age was 39.8 years, making it the only western province with a median above the national level. This was the result of decades of lower fertility that offset the effect of strong migratory inflows.

The population was also younger in the three territories. The lowest median ages in the country were in Nunavut (23.2 years) and the Northwest Territories (30.9 years) caused by their fertility rates which are Canada's highest.

The Yukon, with a median age of 38.0 years, just below the national level, was an exception in the North. This is because it has fertility rates lower than the two other territories.

Immigration does not stop Canada's ageing

Even a substantial increase in the number of immigrants could not stop Canada's population ageing. For example, if Canada was to admit four times as many immigrants per year, the population's median age would still increase, from the current 38.8 to 44.1 years in 2056. This would mean an average of about one million immigrants per year for the next 50 years. Regardless, the proportion of seniors would increase from the current 13.2% to 22.3% in 2056. These results are obtained from the medium-growth scenarios of Statistics Canada's most recent demographic projections (91-520-XIE, free) and by adjusting the number of immigrants by a factor of four.

As it is the case in almost all G8 countries, the only way to stop the Canadian ageing process is to increase fertility. The sole exception among the G8 countries is the United States, with a fertility of nearly two children per woman.

However, there is little to indicate that this will occur in Canada, where the current rate is just over 1.5 children for every woman, whereas the replacement level, above which the ageing process would stop, is 2.1 children per woman.

For example, during the baby boom, when the fertility rate reached up to 3.9 children per woman, the median age of Canada's population fell from 27.7 years to 25.4.

Available on CANSIM: tables 051-0001, 051-0002 and 051-0011 to 051-0013.

Definitions, data sources and methods: survey number 3604.

Data will appear in the *Annual Demographic Statistics Compendium, 2005/2006* CD-ROM to be released in March 2007.

For more information, to obtain additional data, or to enquire about the concepts, methods or data quality of this release, contact Client Services (toll-free 1-866-767-5611 or 613-951-2320; fax: 613-951-2307; demography@statcan.ca), Demography Division.

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Population, median age and age distribution, Canada, 1946 to 2056

Year	Population	Median age	0 to 19	20 to 64	65 and over
%					
1946	12,292,000	27.7	36.6	56.3	7.2
1966	20,014,880	25.4	42.1	50.2	7.7
1986	26,101,155	31.4	28.6	60.9	10.5
2006	32,623,490	38.8	24.0	62.8	13.2
2011 (medium-growth scenarios)	33,909,700	40.1	22.4	63.2	14.4
2031 (medium-growth scenarios)	39,029,400	44.3	19.9	56.7	23.4
2056 (medium-growth scenarios)	42,510,900	46.9	18.4	54.4	27.2

Median age by province and territory, 2001 and 2006

	2001	2006	Difference 2001 to 2006
Canada	37.2	38.8	1.6
Newfoundland and Labrador	38.1	41.3	3.2
Prince Edward Island	37.6	39.8	2.2
Nova Scotia	38.5	41.0	2.5
New Brunswick	38.2	40.8	2.6
Quebec	38.5	40.4	1.9
Ontario	36.7	38.2	1.5
Manitoba	36.4	37.3	0.9
Saskatchewan	36.4	37.7	1.3
Alberta	34.7	35.5	0.8
British Columbia	37.9	39.8	1.9
Yukon	35.8	38.0	2.2
Northwest Territories	29.9	30.9	1.0
Nunavut	22.5	23.2	0.7

Population and age distribution by province and territory, 2006

	Population	0 to 19	20 to 64	65 and over
%				
Canada	32,623,490	24.0	62.8	13.2
Newfoundland and Labrador	509,677	21.9	64.5	13.5
Prince Edward Island	138,519	24.7	60.9	14.4
Nova Scotia	934,405	22.5	62.9	14.6
New Brunswick	749,168	22.3	63.5	14.2
Quebec	7,651,531	22.4	63.5	14.1
Ontario	12,686,952	24.5	62.5	12.9
Manitoba	1,177,765	26.6	59.9	13.6
Saskatchewan	985,386	27.0	58.1	14.9
Alberta	3,375,763	26.0	63.6	10.4
British Columbia	4,310,452	22.5	63.5	14.0
Yukon	31,229	25.7	66.9	7.5
Northwest Territories	41,861	32.4	62.8	4.8
Nunavut	30,782	44.2	53.0	2.9



Natural gas sales

August 2006 (preliminary)

Warmer than normal temperatures in most regions of the country led to lower natural gas sales in the residential sector in August.

However, the 9.0% decline in the residential sales was more than offset by an 11.5% gain in the commercial sector and a 5.2% increase in the industrial (including direct sales).

Natural gas sales totalled 3 971 million cubic metres, up 4.2% from August 2005.

On a year-to-date basis, sales at the end of August were down 5.6% from the same eight-month period last year, in the wake of across-the-board declines in all sectors.

Sales volume of natural gas to the industrial sector (including direct sales) has fallen 4.6% so far this year, while sales were down 7.0% in the residential sector and 6.7% in the commercial.

Natural gas sales

	August 2005	August 2006 ^P	August 2005 to August 2006
	thousands of cubic metres		% change
Total sales	3,812,245	3,970,988	4.2
Residential	437,654	398,106	-9.0
Commercial	343,091	382,675	11.5
Industrial	1,443,566	1,631,008	...
Direct	1,587,934	1,559,199	...
year-to-date			
	2005	2006 ^P	2005 to 2006
	thousands of cubic metres		% change
Total sales	47,533,054	44,892,334	-5.6
Residential	11,487,441	10,684,855	-7.0
Commercial	8,423,076	7,859,258	-6.7
Industrial	12,892,421	12,442,629	...
Direct	14,730,116	13,905,592	...

... not applicable

^P preliminary

Definitions, data sources and methods: survey number 2149.

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

Hog inventories

Third quarter 2006

Hog inventories appear to have tumbled for the fifth consecutive quarter, as prices remained low and disease caused havoc for many producers in Eastern Canada.

Farmers reported 14.1 million hogs on their farms as of October 1, 2006, according to a survey taken in early September. This was down 2.4% from the second quarter of 2006, and 5.3% below the same date last year.

Hogs inventories in Eastern Canada, as of October 1, 2006, were down a substantial 8.0% from the same time last year. Those in Western Canada fell 1.8%.

Diseases, such as porcine circovirus and others, continued to plague hog production in Quebec and Ontario. Since the second quarter 2005, the rate of losses to disease has been double that of prior years.

Although hog prices have improved modestly in recent months, they remained soft earlier in the year, in part because of a stronger dollar. During the first six months of 2006, the average price for hogs was 19.4% lower than the same period in 2005.

With weak prices, hog farm cash receipts during the first half of 2006 plunged to \$1.7 billion, down 19.3% from the same period last year.

In 2006, international exports of Canadian hogs reached near-record levels. Over the years, an increasing number of younger hogs have been exported to the United States for feeding, as farmers take advantage of abundant corn supplies south of the border.

Hog slaughter in Canada slipped 2.6% in the first nine months of 2006 from the same period in 2005. This is consistent with lower prices paid to producers since 2004.

Domestic slaughter rose steadily from 1999 to 2004, reaching a record high of 22.9 million head in 2004. Since then, levels have been declining.

Available on CANSIM: table 003-0004.

Definitions, data sources and methods: survey number 3460.

The report *Hog Statistics*, Vol. 5, no. 4 (23-010-XIE, free) is now available on our website. From the *Publication* page, choose *Free internet publications*, then *Agriculture*.

For general information, contact Client Services (toll-free 1-800-465-1991). To enquire about the concepts, methods or data quality of this release, contact Yukman Cheung (613-951-9180; yukman.cheung@statcan.ca), Agriculture Division. □

Hog inventories
October 1, 2006

	Breeding		Market hogs				Total hogs	
	2006	2005 to 2006	2006	2005 to 2006	2006	2005 to 2006	2006	2005 to 2006
	Under 20 kg		20 kg and over					
	thousands of head	% change	thousands of head	% change	thousands of head	% change	thousands of head	% change
Canada	1,620	-1.7	4,295	-4.0	8,223	-6.6	14,137	-5.3
Atlantic	32	-5.4	96	-6.8	196	0.1	323	-2.6
Quebec	405	-3.9	1,275	0.6	2,250	-15.1	3,930	-9.4
Ontario	431	-2.6	1,102	1.2	1,947	-11.4	3,480	-6.7
East	868	-3.3	2,473	0.5	4,392	-12.9	7,733	-8.0
Manitoba	379	1.9	926	0.6	1,693	4.7	2,998	3.0
Saskatchewan	136	1.8	305	-32.3	879	7.2	1,320	-6.0
Alberta	216	-3.1	518	-13.5	1,186	-2.7	1,920	-5.9
British Columbia	21	-1.9	73	59.0	72	-27.6	166	-0.6
West	752	0.3	1,822	-9.6	3,830	2.0	6,404	-1.8

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

Stocks of frozen and chilled meats

October 2006

Total frozen and chilled red meat in cold storage at the opening of the first business day of October amounted to 78 657 metric tonnes, down 11% from July and down 7% from October 2005. Stocks of frozen poultry meat in cold storage on October 1, 2006, totalled 66 250 metric tonnes, up 3% from a year ago.

Available on CANSIM: tables 003-0081 and 003-0082.

Definitions, data sources and methods: survey number 3423.

The October 2006 issue of *Stocks of Frozen and Chilled Meats*, Vol. 1, no. 3 (23-009-XIE, free) is available from our web site. From the *Publications* module, choose *Free internet Publications*, then *Agriculture*.

For general information, call (toll-free 1-800-465-1991). To enquire about the concepts, methods and data quality of this release, contact Barbara McLaughlin (902-893-7251;

barbara.mclaughlin@statcan.ca),

Agriculture

Division.

Pipeline transportation of crude oil and refined petroleum products

July 2006

Data on the net receipts of crude oil and equivalent hydrocarbons, liquefied petroleum gases and refined petroleum products, pipeline exports of crude oil and deliveries of crude oil by pipeline to Canadian refineries are now available for July.

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

Definitions, data sources and methods: survey numbers, including related surveys, 2148 and 2191.

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

Refined petroleum products

August 2006 (preliminary)

Data on the production, inventories and domestic sales of refined petroleum products are now available for August. Other selected data about these products are also available.

Definitions, data sources and methods: survey number 2150.

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

New products

Stocks of Frozen and Chilled Meats, October 2006,
Vol. 1, no. 3
Catalogue number 23-009-XIE
(free).

Hog Statistics, Vol. 5, no. 4
Catalogue number 23-010-XIE
(free).

Exports by Commodity, August 2006, Vol. 63, no. 8
Catalogue number 65-004-XCB (\$40/\$387).

Exports by Commodity, August 2006, Vol. 63, no. 8
Catalogue number 65-004-XPB (\$84/\$828).

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

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The Daily
Statistics Canada

Thursday, June 3, 1997
For release at 8:30 a.m.

MAJOR RELEASES

- **Urban transit, 1995** 2
Discusses the emphasis on taking urban transit, Canadians are using 8 less and less. In 1996, each Canadian took an average of about 4.1 trips on some form of urban transit, the lowest level in the past 25 years.
- **Productivity, hourly compensation and unit labour cost, 1995** 4
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