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## Releases

## Retail trade

March 2006

Retail sales continued to climb in March after edging down in February, capping the strongest quarterly gain in four years.

Retail sales increased by $1.5 \%$ in March from the previous month to reach a record high of $\$ 32.1$ billion. March's advance boosted this year's first quarter results up 2.2\% over those of the previous three-month period. Record sales were enjoyed by almost all types of retailers this quarter. Excluding auto retailers, sales in the first quarter of 2006 were also up $2.2 \%$.

Retail sales advanced in March after a short pause


Though March was a positive month for most retailers, the automotive sector was responsible for the bulk of the increase. Sales in this sector bounced back from February's decline and jumped $3.3 \%$ in March, the largest monthly increase since the incentive-driven peak of last summer.

Excluding sales by dealers of new, used and recreational vehicles and auto parts, retail sales rose by $0.7 \%$ from February, the fourth consecutive monthly sales increase among non-auto retailers.

With the exception of food and beverage stores (-0.1\%), all retail sectors saw sales increases in

March. Sales in the ever-growing sector of building and outdoor home supplies stores increased by $1.9 \%$. The clothing and accessories stores sector continued to grow strongly ( $+1.7 \%$ ) as did the pharmacies and personal care stores sector $(+1.0 \%)$. Sales growth also occurred among miscellaneous retailers ( $+0.7 \%$ ), general merchandise stores ( $+0.5 \%$ ) and furniture, home furnishings and electronics stores (+0.3\%).

Once price increases are taken into account, retail sales grew by $1.2 \%$ in March after increasing $0.2 \%$ in February.

## All sectors, except food and beverage, post higher sales in March

The automotive sector led all other sectors in sales growth in March. Sales at new car dealers rose $4.6 \%$, making up for a $3.4 \%$ decline in February. Gasoline stations sales advanced by $1.6 \%$, mainly due to a $5.2 \%$ jump in gasoline prices. Used and recreational motor vehicle and parts dealers also saw their sales rise 2.0\% in March.

Within the building and outdoor home supplies stores sector, home centres and hardware stores enjoyed their eighth consecutive month of sales gains in March. Specialized building material and garden stores, a smaller component of this sector, saw their sales edge down $0.4 \%$. Nevertheless, these stores posted one of their strongest quarterly sales gains in 10 years $(+9.3 \%)$, likely due to the unusually warm weather earlier this year.

Prices for clothing and footwear rose $0.7 \%$ in March, inflating sales at clothing stores ( $+2.1 \%$ ). Sales at these stores reached a plateau in early 2005 after strong steady gains throughout 2004. Since the last quarter of 2005, however, sales have once again picked up and continued to grow during the first quarter of 2006.

Pharmacies and personal care stores posted their fifth consecutive sales gain in March. In general, sales in these stores have been on the rise and have only declined once since the end of 2004.

Sales in the food and beverage stores sector remained relatively flat in March. Supermarket sales edged down $0.2 \%$ and were only partially offset by gains among convenience and specialty food stores and beer, wine and liquor stores. Supermarket sales have been fluctuating since mid-2005 and were up 1.2\% in March compared to the same month last year.

## Ontario sales rebound in March

Retail sales rebounded in Ontario after falling sharply in February, posting a $2.9 \%$ sales increase in March. Most of the nation's employment growth in March was concentrated in Ontario and was due to the rise in the number of jobs in the construction and services industries.

Retailers in New Brunswick enjoyed their sixth consecutive increase in sales in March ( $+2.1 \%$ ). Sales in New Brunswick have been on a sharp rise since the fall of 2005. The gain in the first quarter of 2006 ( $+3.3 \%$ ) was the strongest quarterly gain since 2001.

Manitoba (+1.8\%) and Saskatchewan (+1.5\%) also posted significant gains. Alberta retailers witnessed a more modest $0.4 \%$ advance in March, posting a sales increase below the national average for the first time since June 2005. However, Alberta's first quarter results for 2006 were the strongest ( $+5.2 \%$ ) among the provinces and territories as sales have been rapidly climbing since 2004.

All other provinces and territories also posted positive quarterly gains, except for Newfoundland and Labrador ( $-0.3 \%$ ) and the Yukon ( $-1.7 \%$ ).

## Related indicators for April

Total employment rose by an estimated 22,000 in April, mainly in full-time work. This continues the long-term trend of growth in full-time employment.

For the second consecutive month, the bulk of the employment gains were in Ontario.

Housing starts fell by $13.3 \%$ in April. A large decline in multiple urban starts, a volatile component of housing starts, erased all the gains made in March. Single urban starts continued to decrease steadily.

Based on preliminary figures from the auto industry, the number of new motor vehicles sold in April reversed direction, giving up March's gains. Both passenger car and truck sales declined during the month, with truck sales falling slightly more than car sales.

Available on CANSIM: tables 080-0014 to 080-0017 and 076-0005.

Definitions, data sources and methods: survey numbers, including related surveys, 2406 and 2408.

The March 2006 issue of Retail Trade (63-005-XIE, free) will soon be available.

Data on retail trade for April will be released on June 21.

For more information or to order data, contact Client Services (1-877-421-3067; 613-951-3549; retailinfo@statcan.ca). For analytical information, or to enquire about the concepts, methods or data quality of this release, contact Lucy Chung (613-951-1903), Distributive Trades Division.

The Daily, May 19, 2006

|  |  |  |  |  |  |
| :--- | ---: | ---: | ---: | ---: | ---: | ---: |
| Retail sales |  |  |  |  |  |

[^0]The Daily, May 19, 2006

| Retail sales |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: |
|  | $\begin{array}{r} \hline \text { March } \\ 2005 \end{array}$ | $\begin{gathered} \hline \text { February } \\ 2006^{r} \end{gathered}$ | $\begin{gathered} \hline \text { March } \\ 2006^{p} \end{gathered}$ | $\begin{array}{r} \hline \text { March } \\ 2005 \\ \text { to } \\ \text { March } \\ 2006 \\ \hline \end{array}$ |
| Unadjusted |  |  |  |  |
|  | \$ millions |  |  | \% change |
| Automotive | 10,473 | 8,654 | 11,395 | 8.8 |
| New car dealers | 6,329 | 4,808 | 6,705 | 5.9 |
| Used and recreational motor vehicle and parts dealers <br> Gasoline stations | 1,160 2,985 | 976 2,870 | 1,365 3,326 | 17.7 11.4 |
| Furniture, home furnishings and electronics |  |  |  |  |
| stores | 1,906 | 1,829 | 2,129 | 11.7 |
| Furniture stores | 666 | 644 | 747 | 12.1 |
| Home furnishings stores | 354 | 352 | 426 | 20.4 |
| Computer and software stores | 149 | 124 | 143 | -3.9 |
| Home electronics and appliance stores | 737 | 708 | 813 | 10.4 |
| Building and outdoor home supplies stores | 1,467 | 1,335 | 1,706 | 16.3 |
| Home centres and hardware stores | 1,166 | 1,074 | 1,386 | 18.9 |
| Specialized building materials and garden |  |  |  |  |
| Food and beverage stores | 6,927 | 6,275 | 7,103 | 2.5 |
| Supermarkets | 5,143 | 4,679 | 5,256 | 2.2 |
| Convenience and specialty food stores | 730 | 656 | 735 | 0.7 |
| Beer, wine and liquor stores | 1,054 | 940 | 1,112 | 5.6 |
| Pharmacies and personal care stores | 1,957 | 1,933 | 2,153 | 10.0 |
| Clothing and accessories stores | 1,449 | 1,245 | 1,602 | 10.5 |
| Clothing stores | 1,133 | 930 | 1,242 | 9.6 |
| Shoe, clothing accessories and jewellery stores <br> 316 <br> 314 <br> 360 $13.8$ |  |  |  |  |
| General merchandise stores | 3,117 | 2,783 | 3,342 | 7.2 |
| Miscellaneous retailers | 1,383 | 1,281 | 1,479 | 6.9 |
| Sporting goods, hobby, music and book stores | 661 | 596 | 714 | 8.0 |
| Miscellaneous store retailers | 722 | 685 | 765 | 6.0 |
| Total retail sales | 28,679 | 25,334 | 30,909 | 7.8 |
| Total excluding new car dealers, used and recreational motor vehicle and parts dealers | 21,190 | 19,550 | 22,839 | 7.8 |
| Provinces and territories |  |  |  |  |
| Newfoundland and Labrador | 448 | 368 | 445 | -0.6 |
| Prince Edward Island | 101 | 93 | 109 | 8.3 |
| Nova Scotia | 807 | 730 | 889 | 10.2 |
| New Brunswick | 652 | 564 | 711 | 9.1 |
| Quebec | 6,611 | 5,526 | 6,961 | 5.3 |
| Ontario | 10,441 | 9,090 | 11,141 | 6.7 |
| Manitoba | 962 | 848 | 1,039 | 8.1 |
| Saskatchewan | 836 | 755 | 903 | 8.0 |
| Alberta | 3,737 | 3,665 | 4,339 | 16.1 |
| British Columbia | 3,975 | 3,605 | 4,259 | 7.1 |
| Yukon | 34 | 28 | 34 | -0.9 |
| Northwest Territories | 54 | 45 | 56 | 2.3 |
| Nunavut | 21 | 18 | 22 | 5.1 |

[^1]
## Study: Economic importance of transportation

Transportation services make a far bigger contribution to Canada's economy than the "for-hire" transportation industry alone would indicate, a new study has found.

This study shows that the impact of the sector goes well beyond the many companies that provide "for-hire" transportation services, that is, those that use aircraft, trucks, ships or other equipment to offer services to clients for a fee in the market place. Transportation in Statistics Canada's System of National Accounts, which is used to evaluate the performance of the Canadian economy, only identifies for-hire services.


In addition to the for-hire sector, many industries, such as the wholesaling sector, produce their own transportation services by operating fleets of trucks, buses or ships, and so on. This is referred to as "own-account", "in-house" or "private" transportation.

The study found that the for-hire transportation industry itself accounts for about $3.7 \%$ of economic output as measured by gross domestic product. However, when own-account services are included, the contribution of the entire sector jumps to $6.3 \%$.

This places transportation's contribution ahead of several major industrial groupings, such as retail trade, construction and the huge mining, oil and gas sector. Still, transportation's contribution was about one-third

## Note to readers

Statistics Canada, in conjunction with Transport Canada, is developing a Transportation Satellite Account that would include values for all transportation activity in Canada, as well as supporting services and capital infrastructure.

The purpose of this study was to measure the value of "own-account" transportation, an important step toward the building of a Transportation Satellite Account. This approach measures both "for-hire" and "own-account" transportation services. Thus, it provides a more comprehensive measure of transportation services in whatever industries they occur.

Transportation in the System of National Accounts only identifies for-hire services. For-hire transportation firms use transportation equipment, such as aircraft, trains, vessels, trucks, buses and taxis, as well as labour, energy and other goods and services, to offer transportation services to users for a fee in the market place. However, for-hire activities do not capture all transportation activities in the economy.

Businesses also produce their own transportation services in support of their main lines of activity, but these are not classified as transportation industries in the System of National Accounts. Instead, they are "own-account" transportation services that are captured under the output of the industry producing them, not under "transportation."

The primary purpose of this research was to estimate the value of these activities and transfer these amounts from the producing industries to an "own-account" transportation industry. The results are based on calendar year 2000, which was the most recent available for the required data sources.
of that of the manufacturing sector and the finance, insurance and real estate sector.

The study estimates the total contribution of transportation to the economy in 2000 amounted to nearly $\$ 64$ billion. Of this total, own-account transportation services represented about $42 \%$, or nearly $\$ 27$ billion. (In contrast, the contribution of manufacturing to the economy was estimated at just over $\$ 186$ billion.)

The composition of the two transportation components, for-hire and own-account, is quite different. Truck and delivery van services dominate own-account transportation, accounting for nearly $89 \%$. The remaining $11 \%$ consists of small proportions for air, rail, water, bus and other ground transportation.

On the other hand, truck and delivery services accounted for only $45 \%$ of the for-hire component, while air represented nearly $13 \%$, rail $11 \%$ and water $2.5 \%$.

## Transportation's contribution ranks behind only four sectors

The contribution of total transportation services in the Canadian economy ranked behind only four other sectors: manufacturing; finance, insurance and real
estate; and commercial, professional, personal and other services; and public administration.

Manufacturing accounted for $18.5 \%$ of economic output in 2000, followed closely by finance, insurance and real estate at $18.1 \%$. Commercial, professional, personal and other services represented $11.2 \%$, while public administration accounted for $7.1 \%$.

However, the contribution of the entire transportation sector of $6.3 \%$ put it ahead of sectors such as construction, which accounted for $5.0 \%$, retail trade, which accounted for $4.8 \%$ and wholesale trade, $4.7 \%$.

In terms of value, total transportations services were most important in the manufacturing sector and in commercial, professional, personal and other services. Companies in each sector spent just over $\$ 16$ billion on transportation in 2000.

The total for the commercial, professional, personal and other sector includes transportation costs for business travel. For-hire transport dominated both these industry groups.

Three other sectors (wholesale trade, retail trade and construction) were also large users of transportation services in value terms. These industries were more reliant on own-account transportation. Companies in wholesale trade spent just over $\$ 9$ billion on transportation in 2000.

## In relative terms, demand for transportation services highest in wholesale trade

Nationally, industries spent an estimated 3.4 cents on transportation for every dollar of output in 2000, according to the study.

The demand in relative terms was above this national average in five sectors: wholesale trade; retail trade; commercial, professional, personal and other services; agriculture, forestry and fishing; and automotive rental, leasing repair and maintenance services.

For every dollar of output, wholesalers spent 10.3 cents on transportation services, higher by far than any other industry group.

Retailers were next, with transportation making up 7.6 cents of every dollar of output. Wholesalers and retailers, in particular, rely heavily on own-account by supplying over $80 \%$ and $70 \%$ of their transportation needs respectively. This is virtually all related to truck and delivery van services.

For-hire transportation services for retailers are also heavily geared to trucking. On the other hand, the for-hire transport needs of wholesalers are primarily tied to both trucking and transportation support services. The latter are intermediaries between shippers and carriers such as, freight forwarders, shipping agents and customs brokers.

Other industries that relied more heavily on own-account than for-hire transportation were: agriculture, forestry and fishing; mining, quarrying and oil and gas; construction; and public administration (mainly provincial and municipal governments). Demands for transportation services were lowest for the hospitals and health care industries.

However, transportation costs accumulate through the production process from natural resources through stages of manufacturing, the distribution of goods and the delivery of services.

At the end of the line, to deliver a dollar's worth of goods and services to final demand requires 6.4 cents of transportation services. The highest transportation costs were associated with wholesaling services, where they accounted for more than 13 cents.

Detailed data tables are available (free) upon request.

The full research report The Economic Importance of Transportation in Canada: Measuring Own-account Transportation toward the Development of a Transportation Satellite Account (13-597-XIE, free) will be available in June.

For data tables and further information, or to enquire about the concepts, methods or data quality of this release, contact Hans Messinger (613-951-3621; hans.messinger@statcan.ca), or Lyle Sager (613-951-9164; Iyle.sager@statcan.ca), Industry Accounts Division.

Profile of transportation services in the Canadian economy

| Industry | Gross <br> domestic <br> product | Share <br> of | Share of gross domestic product <br> domestic <br> product |  |
| :--- | ---: | ---: | ---: | ---: |

[^2]Profile of demand and costs for transportation services

| Industry | Direct demand for transportation services |  |  | Cost per dollar of industry output |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | For-hire | Own-account | Total | For-hire | Own-account | Total |
|  | \$ millions |  |  | \% |  |  |
| Agriculture, forestry and fishing | 1,324 | 1,525 | 2,849 | 2.4 | 2.8 | 5.2 |
| Mining, quarrying and oil wells | 505 | 980 | 1,485 | 0.6 | 1.1 | 1.7 |
| Manufacturing | 10,921 | 5,221 | 16,142 | 1.9 | 0.9 | 2.8 |
| Construction | 1,648 | 2,378 | 4,027 | 1.4 | 2.0 | 3.3 |
| Utilities | 347 | 178 | 526 | 1.0 | 0.5 | 1.5 |
| Automotive rental, leasing, repair and maintenance | 126 | 298 | 424 | 1.2 | 2.7 | 3.9 |
| Information, culture, arts and entertainment | 632 | 495 | 1,127 | 1.1 | 0.9 | 2.0 |
| Wholesale trade | 1,779 | 7,273 | 9,052 | 2.0 | 8.3 | 10.3 |
| Retail trade | 1,812 | 4,529 | 6,340 | 2.2 | 5.4 | 7.6 |
| Finance, insurance and real estate | 1,876 | 497 | 2,374 | 0.7 | 0.2 | 0.9 |
| Public administration | 1,774 | 2,029 | 3,803 | 1.3 | 1.4 | 2.7 |
| Educational services | 1,735 | 541 | 2,276 | 2.9 | 0.9 | 3.9 |
| Hospitals, health and social services | 305 | 221 | 526 | 0.4 | 0.3 | 0.7 |
| Commercial, professional, personal and other services | 12,751 | 3,657 | 16,408 | 4.1 | 1.2 | 5.3 |
| Total | 37,537 | 29,822 | 67,359 | 1.9 | 1.5 | 3.4 |

## Study: Impact of free trade on plant scale, length of production run and diversification

 1973 to 1997Canadian manufacturing plants reduced the number of their products during the 1990s following the Canada-US Free Trade Agreement (FTA), but increased their output and the length of their production runs, according to a new study.

The study examines the effect of trade liberalization on Canadian manufacturing plants by focusing on the impacts on two groups of plants: exporters and non-exporters.

The issue has dominated discussions on potential benefits of trade liberalization in Canada. Operating behind tariff barriers and limited market size, Canadian plants have been described as having production runs that were too short to exploit economies of large-scale production.

The study found that the average length of production run of Canadian manufacturing plants increased from 1973 to 1997. But the gain was more rapid during the 1990s following implementation of the FTA.

From 1973 to 1990, production runs increased at an annual average rate of $3.6 \%$. From 1990 to 1997, this rate accelerated to $9.4 \%$.

The length of production run increased for both exporters and non-exporters, but the increase was heavier among exporters. From 1990 to 1997, production runs increased at an annual rate of $9.4 \%$ for an average exporting plant, but only at $5.7 \%$ a year for an average non-exporting plant.

Plant scale among manufacturers also increased over time, and the rate of growth accelerated swiftly during the 1990s as a result of trade liberalization. The output of an average manufacturing plant increased $7.1 \%$ a year on average from 1990 to 1997, three times the average annual growth rate of $2.4 \%$ from 1973 to 1990.

Plant scale increased for both exporters and non-exporters during the 1990s, and again the increase was greater among exporters.

However, product diversification fell over time among Canadian manufacturing plants. The estimated index of product diversification declined 2.4\% a year from 1990 to 1997 for an average manufacturing plant. This was double the decline of $1.2 \%$ from 1973 to 1990.

Product diversification declined in both exporters and non-exporters, but the decline was quicker among exporters. In 1973, exporters tended to have a higher level of product diversification than non-exporters.

In 1997, there was little difference in the product diversification of exporters and non-exporters.

The research paper The Impact of Trade on Plant Scale, Production-run Length and Diversification (11F0027MIE2006038, free) is now available online. To obtain a copy, go to the Our products and services page online.

More studies related to firm strategies and performance and international trade are available free of charge in the analytical series Update on Economic Analysis (11-623-XIE) on our website.

For more information, or to enquire about the concepts, methods or data quality of this release, contact John Baldwin (613-951-8588) or Wulong Gu (613-951-0754), Micro-economic Analysis Division.

## Steel primary forms, weekly data

Week ending May 13, 2006 (preliminary)
Steel primary forms production for the week ending May 13 totalled 327298 metric tonnes, up $3.1 \%$ from 317499 tonnes a week earlier and up 3.2\% from 317136 tonnes in the same week of 2005.

The year-to-date total as of May 13 was 5788200 tonnes, down 2.3\% from 5922205 tonnes in the same period of 2005.

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.

## Aircraft movement statistics

April 2006 (preliminary)
The 42 Canadian airports with NAV CANADA air traffic control towers reported 379,573 aircraft take-offs and landings in April, up 0.9\% compared with April 2005 (376,230 movements). Year-over-year increases in aircraft movements were reported by 24 of the airports in April 2006. The variations ranged from an increase of $111.0 \%$ at Winnipeg/St. Andrews to a decline of $35.0 \%$ at Sault Ste Marie.

Itinerant movements (flights from one airport to another) decreased by $1.1 \%$ ( $-2,880$ movements) in April 2006 compared with the same month a year earlier. Local movements (flights that remain in the vicinity of
the airport) increased by $5.4 \%$ ( $+6,223$ movements) in April compared with April 2005.

The April 2006 issue of Aircraft Movement Statistics, Vol. 5, no. 4 (51F0001PIE, TP1496, free) is now available. To obtain a copy, go to the Our products and services page online.

Preliminary statistics for the 56 Canadian airports with NAV CANADA flight service stations are also available for April.

Available on CANSIM: table 401-0005.
Definitions, data sources and methods: survey number 2715.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Kathie Davidson (613-951-0141; fax: 613-951-0010; aviationstatistics@statcan.ca), Transportation Division.

## Industrial chemicals and synthetic resins

## March 2006

Data on industrial chemicals and synthetic resins are now available for March.

Available on CANSIM: table 303-0014.
Definitions, data sources and methods: survey number 2183.

The March 2006 issue of Industrial Chemicals and Synthetic Resins, Vol. 49, no. 3 (46-002-XIE, free) is now available. To obtain a copy, go to the Our products and services page online.

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.

## Construction type plywood

January, February and March 2006
Data on construction type plywood are now available for January, February and March.

Available on CANSIM: tables 303-0056 and 303-0057.
Definitions, data sources and methods: survey number 2138.

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

Economic Analysis Research Paper Series: The Impact of Trade on Plant Scale, Production-run Length and Diversification, no. 38 Catalogue number 11F0027MIE2006038 (free).

## Industrial Chemicals and Synthetic Resins,

March 2006, Vol. 49, no. 3 Catalogue number 46-002-XIE (free).

Aircraft Movement Statistics, April 2006, Vol. 5, no. 4 Catalogue number 51F0001PIE (free).

## Aviation: Service Bulletin, Vol. 38, no. 2 <br> Catalogue number 51-004-XIB (free).

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

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## Release dates: May 23 to 26, 2006

(Release dates are subject to change.)

| Release <br> date | Title | Reference period |
| :--- | :--- | :--- |
| 23 | Non residential investment | 2005 |
| 24 | Foreign direct investment | 2005 |
| 24 | Leading indicators | April 2006 |
| 25 | Quarterly financial statistics for enterprises | First quarter 2006 |
| 26 | Net farm income | 2005 |
| 26 | Farm cash receipts | First quarter 2006 |


[^0]:    $r$ revised
    $p$ preliminary

[^1]:    ${ }^{r}$ revised
    p preliminary

[^2]:    ... not applicable

