



The Daily

Statistics Canada

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Releases

Monthly Survey of Manufacturing, April 2006

3

Despite a boost from price increases for petroleum products and primary metals, shipments declined in April, losing most of March's gains.

New motor vehicle sales, April 2006

7

New motor vehicle sales edged down in April, giving up the minimal gains realized in March.

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Survey of Household Spending Public-use Microdata File

2004

Understanding consumer spending is important for a wide variety of users, including social policy analysts, advocacy and community groups, businesses and all levels of government. The *Survey of Household Spending Public-use Microdata File* offers users the ability to conduct their own analysis of spending on a wide variety of goods and services as well as dwelling characteristics and possession of household equipment and services. Results from the 2004 Survey of Household Spending were originally released in *The Daily* on December 12, 2005. All records have been thoroughly screened to ensure the anonymity of respondents.

The microdata file contains information about expenditures at the household level on a wide variety of goods and services: food, shelter, clothing, transportation, health care, child care, education, reading materials, communications, recreation, furniture, tobacco and alcohol, gambling, taxes, insurance premiums, pension contributions, money gifts, and charitable contributions.

It also collects information about dwelling characteristics such as type of dwelling, whether repairs are needed, tenure (owned or rented), year of move, period of construction, number of rooms and bathrooms, and the age and type of heating equipment and fuel used. Household equipment presented includes a variety of household appliances, communications and entertainment equipment and services, and the number of vehicles owned.

The *Survey of Household Spending Public-use Microdata File, 2004* (62M0004XCB, \$3,210) is now available. See *How to order products*. Also available are revised microdata files that include updated survey weights for the 1997 to 2003 Survey of Household Spending.

For more information about the survey results and related products and services, contact Client Services (613-951-7355 or toll-free 1-888-297-7355; fax: 613-951-3012; income@statcan.ca), Income Statistics Division.



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Releases

Monthly Survey of Manufacturing

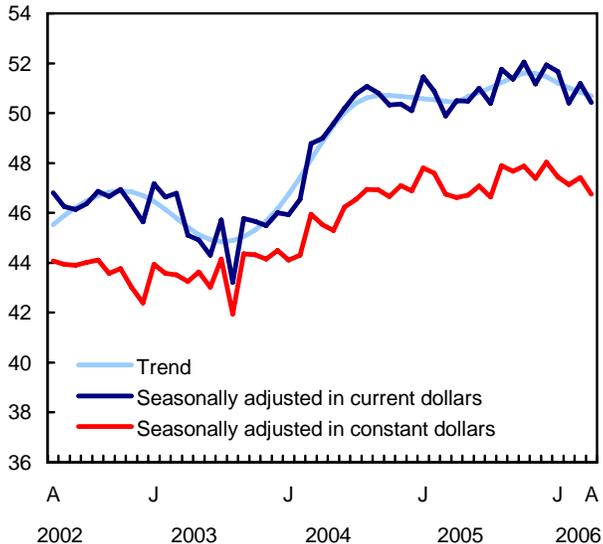
April 2006

Despite a boost from price increases for petroleum products and primary metals, shipments declined in April, losing most of March's gains.

A substantial drop in the production of aerospace products and parts was largely behind April's 1.5% decrease in shipments which stood at \$50.4 billion. This was the third decline so far in 2006, and followed March's 1.6% advance in shipments. Excluding the aerospace industry, shipments were down a more modest 0.4%.

Wide ranging declines pull down shipments

\$ billions



The sharp drop in shipments boosted the inventory-to-shipment ratio to 1.31 in April, equal to the ratio's recent high set in February.

Uncertainty in the manufacturing sector, due in part to the strengthened value of the Canadian dollar and soaring input costs, have contributed to some weakness in shipment activity. As a result, the trend of the inventory-to-shipment ratio has been on a gradual, upward movement over the last few months.

The inventory-to-shipment ratio is a key measure of the time, in months, that would be required to exhaust inventories if shipments were to remain at their current level.

Note to readers

Non-durable goods industries include food, beverage and tobacco products, textile mills, textile product mills, clothing, leather and allied products, paper, printing and related support activities, petroleum and coal products, chemicals, and plastics and rubber products.

Durable goods industries include wood products, non-metallic mineral products, primary metals, fabricated metal products, machinery, computer and electronic products, electrical equipment, appliances and components, transportation equipment, furniture and related products and miscellaneous manufacturing.

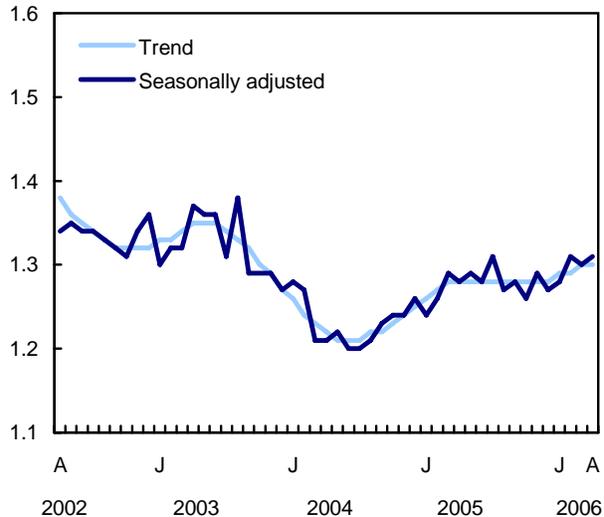
Unfilled orders are a stock of orders that will contribute to future shipments assuming that the orders are not cancelled.

New orders are those received whether shipped in the current month or not. They are measured as the sum of shipments for the current month plus the change in unfilled orders. Some people interpret new orders as orders that will lead to future demand. This is inappropriate since the "new orders" variable includes orders that have already been shipped. Readers should note that the month-to-month change in new orders may be volatile. This will happen particularly if the previous month's change in unfilled orders is closely related to the current month's change.

Not all orders will be translated into Canadian factory shipments because portions of large contracts can be subcontracted out to manufacturers in other countries. Also, some orders may be cancelled.

The inventory-to-shipment ratio equals its recent high

Ratio



A cool start to spring

In April, two-thirds of the manufacturing industries, accounting for 66% of total shipments, posted declines. Both the durable (-1.8%) and nondurable goods (-1.1%) sectors recorded lower shipments for the month.

A quarter-end boost in production in March by some aerospace manufacturers led to a larger than normal drop in production in April. Production of aerospace products and parts fell 37.8% to \$892 million in April, following last month's 38.2% surge. Despite the decline, a gradual recovery in global demand for aircraft and parts has fuelled growth in Canada's aerospace industry compared to last year.

Food manufacturers also reported wide ranging declines, as shipments tumbled 4.2% to \$5.6 billion. Decreases were extensive and included the dairy products, grain and oilseed milling and meat products industries.

The fabricated metal products industry also registered a 3.4% drop in shipments to \$3.1 billion, following some big orders shipped in recent months.

Shipments fall despite price hikes for gas and metals

In spite of strong demand and sky-high prices for primary metals and petroleum, the strength of these industries only partly offset the overall decline in shipments for April.

Soaring prices contributed to a 5.5% jump in shipments of primary metals to \$4.4 billion. Robust demand and low inventories for certain metals, including copper, zinc and nickel, have driven up prices in recent months. The industrial price index of primary metals has risen 13% since December, soaring 6.4% in April alone.

Motor vehicle shipments increased 2.7% to \$5.3 billion in April, following a 6.8% decline in March due to temporary plant closures. Notwithstanding April's gain, the auto sector continues to struggle with a range of challenges from weakening retail sales in North America, to rising interest rates and high consumer debt in the United States. Year-to-date shipments of motor vehicles were down 9.5% in the first four months of 2006 compared to the same period in 2005.

April saw the return of record high prices for petroleum products. By mid-month, the price of crude oil exceeded \$73 US per barrel, surpassing its previous apex in September 2005. Unease regarding supply as the summer driving season fast approaches, coupled with global tensions concerning Iran and other oil-producing regions have contributed to the recent price speculation. Petroleum shipments rose 2.6% to \$4.9 billion in April and might have been higher but

temporary refinery shutdowns largely counterbalanced the 9.6% spike in petroleum prices.

Manufacturers produce less in April

The volume of goods shipped also fell for the third time in the last four months. At 1997 prices, shipments dropped 1.4% to \$46.8 billion.

Notwithstanding the many challenges of the last year, manufacturers have held their own as the volumes of goods shipped remained relatively stable over the last 12 months. That said, these challenges may have eroded opportunities for market expansion and employment growth. Constant dollar shipments for the period January-to-April 2006 were essentially unchanged with that of the same period last year.

Quebec and Alberta were among the seven provinces and the Yukon to post lower shipments in April. Big declines in aerospace production coupled with the food and wood products industries pulled down shipments in Quebec by \$393 million (-3.1%) to \$12.1 billion.

The machinery and chemical products industries contributed to the relatively widespread decreases among Alberta's manufacturers. Shipments fell by \$164 million (-3.1%) to \$5.1 billion in Alberta, marking the third decrease in the last four months by the province's manufacturers.

Manufacturing shipments, provinces and territories

	March 2006 ^r	April 2006 ^p	March to April 2006
Seasonally adjusted			
	\$ millions		% change
Canada	51,198	50,432	-1.5
Newfoundland and Labrador	268	223	-16.5
Prince Edward Island	121	116	-3.5
Nova Scotia	799	804	0.6
New Brunswick	1,259	1,216	-3.4
Quebec	12,491	12,098	-3.1
Ontario	25,178	25,097	-0.3
Manitoba	1,083	1,094	1.0
Saskatchewan	917	965	5.2
Alberta	5,253	5,089	-3.1
British Columbia	3,820	3,721	-2.6
Yukon	1	1	-3.7
Northwest Territories including Nunavut	7	7	2.8

^r revised

^p preliminary

Dissatisfaction prevails among manufacturers

With the recent erosion in both the value and the volume of goods shipped, dissatisfaction has emerged

among manufacturers as reported in the April Business Conditions Survey. Manufacturers are anticipating tough times in the months ahead as the effects of the high-valued Canadian dollar and soaring input costs continue to cut into their bottom lines.

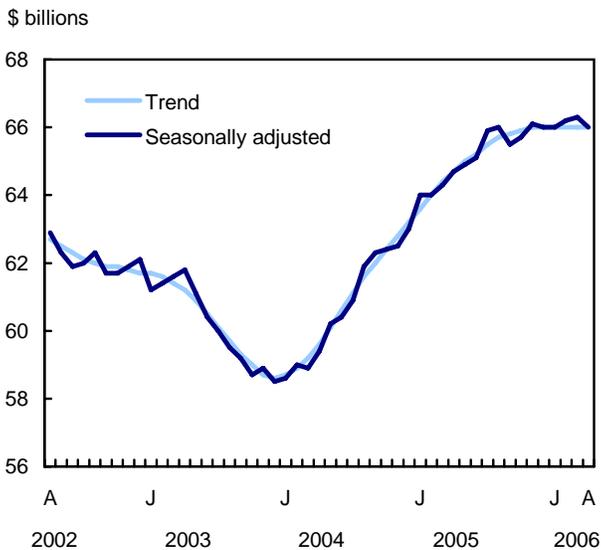
Inventories trimmed in April

Manufacturers' inventories were reduced by 0.5% to \$66.0 billion in April, the first decline since December. The aerospace industry (-11.6%) was the main contributor, but that was partly offset by inventory gains in the primary metals (+4.4%) and chemical products (+2.0%) industries.

April's decrease in inventories was concentrated in the goods-in-process stage of fabrication, which fell by 2.3% to \$15.3 billion. This followed a healthy 2.6% rise in March, and the recent volatility was due to aerospace manufacturers working through orders for their quarter end last month.

Inventories of raw materials edged up 0.2% to \$28.7 billion, the fourth increase in a row, while finished product inventories remained constant at \$22 billion.

Manufacturers tighten inventories for the first time since December



Fewer orders on the books

New orders fell 2.3% to \$50.1 billion in April. The aerospace industry (-49.3%) has been partly responsible for the flux in new orders received in recent months. Excluding aerospace products and parts, new orders were down 1.0%.

Other industries with sizeable declines included machinery (-9.4%) and motor vehicle parts (-3.5%). The decrease in new orders overall was slightly offset by a 5.4% gain in contracts received by the hot primary metals industry.

Unfilled orders decline, but the level remains healthy compared to 2005

The backlog of unfilled orders weakened somewhat in April as some cancelled orders contributed to a 0.9% decrease to \$42.9 billion.

April's setback was only the second decline in unfilled orders in the last eight months. So far in 2006, the average level of unfilled orders has remained 10.6% above last year's average.

Manufacturers of big ticket industries including aerospace products and parts (-1.1%) and machinery (-2.3%) contributed to the decline in unfilled orders.

Unfilled orders decline in April



Available on CANSIM: tables 304-0014, 304-0015 and 377-0008.

Definitions, data sources and methods: survey number 2101.

All data are benchmarked to the 2001 Annual Survey of Manufactures.

Data from the May Monthly Survey of Manufacturing will be released on July 14.

The 2005 annual review of manufacturing shipments will be released on June 28.

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 Russell Kowaluk (613-951-0600, kowarus@statcan.ca), Manufacturing, Construction and Energy Division.

Shipments, inventories and orders in all manufacturing industries

	Shipments		Inventories		Unfilled orders		New orders		Inventories-to-shipments ratio		
	Seasonally adjusted										
	\$ millions	% change	\$ millions	% change	\$ millions	% change	\$ millions	% change			
April 2005	50,506	1.3	64,663	0.6	39,656	0.3	50,621	-0.3	1.28		
May 2005	50,488	0.0	64,914	0.4	40,256	1.5	51,088	0.9	1.29		
June 2005	51,004	1.0	65,061	0.2	40,609	0.9	51,357	0.5	1.28		
July 2005	50,391	-1.2	65,933	1.3	41,327	1.8	51,109	-0.5	1.31		
August 2005	51,755	2.7	65,982	0.1	42,095	1.9	52,523	2.8	1.27		
September 2005	51,359	-0.8	65,510	-0.7	41,947	-0.4	51,211	-2.5	1.28		
October 2005	52,058	1.4	65,658	0.2	42,464	1.2	52,575	2.7	1.26		
November 2005	51,176	-1.7	66,112	0.7	42,602	0.3	51,315	-2.4	1.29		
December 2005	51,943	1.5	65,950	-0.2	42,700	0.2	52,040	1.4	1.27		
January 2006	51,672	-0.5	65,973	0.0	43,004	0.7	51,977	-0.1	1.28		
February 2006	50,401	-2.5	66,176	0.3	43,265	0.6	50,662	-2.5	1.31		
March 2006	51,198	1.6	66,311	0.2	43,322	0.1	51,255	1.2	1.30		
April 2006	50,432	-1.5	66,001	-0.5	42,949	-0.9	50,059	-2.3	1.31		

Manufacturing industries except motor vehicle, parts and accessories

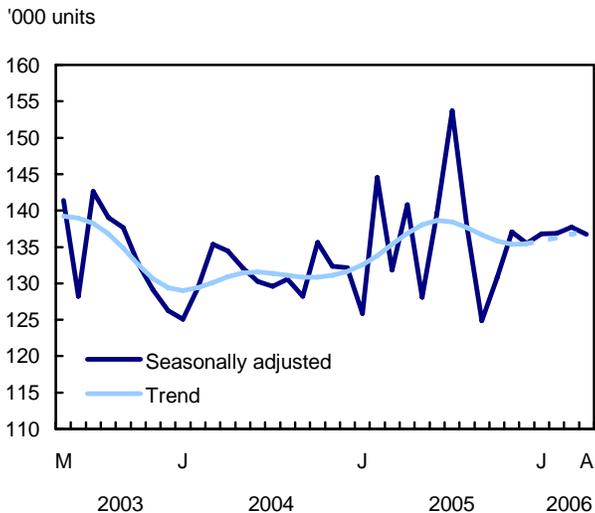
	Shipments		Inventories		Unfilled orders		New orders	
	Seasonally adjusted							
	\$ millions	% change	\$ millions	% change	\$ millions	% change	\$ millions	% change
April 2005	42,228	0.8	60,748	0.5	37,406	0.4	42,385	-0.9
May 2005	42,241	0.0	61,066	0.5	38,027	1.7	42,862	1.1
June 2005	42,531	0.7	61,172	0.2	38,484	1.2	42,988	0.3
July 2005	42,226	-0.7	61,844	1.1	39,092	1.6	42,834	-0.4
August 2005	42,805	1.4	61,968	0.2	39,881	2.0	43,593	1.8
September 2005	42,981	0.4	61,503	-0.7	39,755	-0.3	42,855	-1.7
October 2005	43,201	0.5	61,843	0.6	40,315	1.4	43,761	2.1
November 2005	42,863	-0.8	62,317	0.8	40,412	0.2	42,960	-1.8
December 2005	43,489	1.5	62,191	-0.2	40,434	0.1	43,511	1.3
January 2006	43,698	0.5	62,235	0.1	40,677	0.6	43,941	1.0
February 2006	42,300	-3.2	62,536	0.5	40,851	0.4	42,474	-3.3
March 2006	43,503	2.8	62,791	0.4	40,736	-0.3	43,388	2.2
April 2006	42,689	-1.9	62,536	-0.4	40,388	-0.9	42,342	-2.4

New motor vehicle sales

April 2006

New motor vehicle sales decreased 0.7% in April, erasing the gain of 0.6% in March. Consumers drove 136,724 new vehicles off dealer lots in April, a decrease of about 1,000 vehicles from the previous month.

New vehicle sales edge down



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

New motor vehicle sales have remained relatively stable during the last six months. This followed a series of major sales swings throughout much of 2005 which were influenced by the introduction and subsequent removal of major incentive programs. After a steep decline at the end of 2003, new motor vehicle sales recovered partially and then levelled out for the remainder of 2004.

Based on preliminary sales figures from the auto industry, the number of new motor vehicles declined again in May, falling by about 1%. Truck sales accounted for the bulk of this decline, although passenger car sales also decreased during the month but to a lesser degree.

Car and truck sales reverse course

Sales of both passenger cars and trucks dipped in April, although car sales showed a slightly larger decline.

Car sales decreased by 0.9%, pulled down by weak sales of North American built vehicles. Overseas built cars raced ahead 7.4% in April for a third consecutive month of gains. Those gains, however, were erased by a 4.6% slump in North American built vehicles which

Note to readers

Seasonally adjusted estimates of new motor vehicle sales have been revised for 2004 and 2005 to reflect an update in seasonal adjustment factors. Because of the constant evolution of seasonal factors, revisions can be more significant for some months of the year. However, the annual sum of seasonally adjusted figures corresponds to the annual sum of adjusted estimates.

All data in this release are seasonally adjusted.

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 new 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 for British Columbia.

The New Motor Vehicle Sales Survey is compiled on the basis of figures obtained from motor vehicle manufacturers and importers. These results may vary from those obtained directly from auto dealers, due to possible differences in record keeping.

account for about two-thirds of passenger car sales in Canada.

Overall, car sales have generally stabilized in the past six months, following a softening in sales at the end of 2005 as generous incentive programs came to an end. Prior to this, sales had increased gradually during the first half of 2005. In 2004, sales remained relatively stable following some increases early in the year.

Truck sales (which include minivans, sport-utility vehicles, light and heavy trucks, vans and buses) decreased 0.6% in April. This was the first decline for truck sales in 2006. Despite rising gas prices, truck sales have been fairly stable for the last five months. Truck sales have gradually improved since the beginning of 2004, although they showed great volatility in 2005.

Sales decline in most provinces

Sales declined in seven provinces in April. Only Newfoundland and Labrador recorded a sizeable gain during the month (+4.8%), following two months of declining sales.

Quebec (+0.3%) and Alberta (+0.1%) were the only other provinces to post gains during the month. There have been slight gains in Quebec sales in each of the last three months. Sales in Alberta had been on a tear, with strong growth since January 2004.

Five provinces have yet to see a notable recovery in new motor vehicle sales since certain incentives were introduced in the summer of 2005 and subsequently removed.

In Eastern Canada, sales in Newfoundland and Labrador have been steadily declining since July 2005, despite the recent gain this April. Sales in New Brunswick also rallied briefly in the summer of 2005, but generally have been decreasing since the beginning of 2002. Sales in Quebec have been sliding since last summer, although the recent string of small gains may signal some stabilization.

Out West, vehicle sales in Manitoba and Saskatchewan have declined since last summer, with the trend somewhat more pronounced in Manitoba.

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

Definitions, data sources and methods: survey number 2402.

The April 2006 issue of *New Motor Vehicle Sales* (63-007-XIE, free) will be available soon.

Data on new motor vehicle sales for May will be released on July 17.

For general information or to order data, contact Client Services (1-877-421-3067; 613-951-3549; retailinfo@statcan.ca). To enquire about the concepts, methods or data quality of this release, contact Serge Grenier (613-951-3566), Distributive Trades Division.

□

New motor vehicle sales

	April 2005	March 2006 ^f	April 2006 ^p	April 2005 to April 2006	March to April 2006
seasonally adjusted					
	number of vehicles			% change	
New motor vehicles	140,800	137,731	136,724	-2.9	-0.7
Passenger cars	74,102	70,931	70,317	-5.1	-0.9
North American ¹	50,961	48,899	46,659	-8.4	-4.6
Overseas	23,141	22,032	23,659	2.2	7.4
Trucks, vans and buses	66,698	66,800	66,406	-0.4	-0.6
New motor vehicles					
Newfoundland and Labrador	2,181	1,856	1,945	-10.8	4.8
Prince Edward Island	432	415	391	-9.5	-5.8
Nova Scotia	4,089	4,270	3,832	-6.3	-10.3
New Brunswick	2,983	2,838	2,796	-6.3	-1.5
Quebec	35,069	33,081	33,187	-5.4	0.3
Ontario	52,380	51,633	51,502	-1.7	-0.3
Manitoba	3,930	3,806	3,627	-7.7	-4.7
Saskatchewan	3,584	3,264	3,141	-12.4	-3.8
Alberta	18,984	20,075	20,099	5.9	0.1
British Columbia ²	17,167	16,492	16,205	-5.6	-1.7
	April 2005	March 2006 ^f	April 2006 ^p	April 2005 to April 2006	
unadjusted					
	number of vehicles			% change	
New motor vehicles	167,441	155,990	159,436	-4.8	
Passenger cars	91,395	79,363	86,258	-5.6	
North American ¹	62,166	54,748	57,142	-8.1	
Overseas	29,229	24,615	29,116	-0.4	
Trucks, vans and buses	76,046	76,627	73,178	-3.8	
New motor vehicles					
Newfoundland and Labrador	2,872	1,992	2,575	-10.3	
Prince Edward Island	510	399	442	-13.3	
Nova Scotia	5,592	4,842	4,845	-13.4	
New Brunswick	3,755	3,419	3,483	-7.2	
Quebec	45,583	39,979	41,885	-8.1	
Ontario	59,703	59,060	57,558	-3.6	
Manitoba	4,647	4,111	4,192	-9.8	
Saskatchewan	4,193	3,404	3,565	-15.0	
Alberta	22,193	20,961	23,427	5.6	
British Columbia ²	18,393	17,823	17,464	-5.1	

^r revised

^p preliminary

1. Manufactured or assembled in Canada, the United States or Mexico.

2. Includes Yukon, the Northwest Territories and Nunavut.



Transportation industry: Year in review 2005

Canada's transportation sector posted strong growth for the second consecutive year in 2005 as economic activity in three major modes (trucking, rail and aviation) increased substantially, according to a year-end review.

Economic output in the transportation sector, as measured by gross domestic product (GDP), rose 4.5% in 2005 following a 4.6% increase the year before.

More than one-third (35%) of the GDP generated by the transportation sector in 2005 came from trucking.

Air, water and rail transportation combined contributed another 25%. The remainder was generated by transit, pipeline, and scenic and support activities for the industry.

Air transportation experienced the fastest growth in economic output in years during 2005, as its GDP jumped 11.8% on the heels of a 7.9% gain in 2004.

These back-to-back increases halted three years of decline in economic output in the air industry. Output in 2005 amounted to nearly \$4.2 billion, just below the peak of \$4.3 billion in 2000.

Output in trucking rose 4.4% last year, a slight slowdown from 2004. Over the last decade, trucking experienced an average annual growth of 5.2%, a faster rate than the 3.4% average for the overall economy.

Last year, the approximately 3,360 for-hire trucking companies generated \$27.1 billion in revenues, up 7.9% from 2004. An important shift occurred in the source of growth for trucking, as domestic traffic increased three times faster than international traffic.

Trucking is a large consumer of energy, so rising fuel prices have created some concern, although overall profitability for the industry has remained positive. The number of jobs in the trucking industry has shown steady growth over the past several years.

The rail sector posted strong growth in GDP for the second consecutive year in 2005. Last year's 5.0% increase was a slightly faster pace than the 4.3% gain in 2004.

Since the turn of the millennium, GDP in the rail sector has grown at an annual average rate of 2.3%, about half the increase in the trucking industry.

Canadian railways carried their heaviest freight load so far this decade in 2005, thanks to pressing demand for primary goods from China and other Asian nations.

Last year, the transportation sector contributed about 4.2% of Canada's total GDP. To put that into perspective, the huge mining and oil and gas extraction sector contributed 3.7% to GDP.

Employment in the transportation sector as a whole also showed some growth in 2005, although not every mode increased its number of employees. The total was

up 1.2% from 2004. However, between 2001 and 2004, growth was sluggish.

Definitions, data sources and methods: survey numbers, including related surveys, 2715, 2732, 2734 and 2748.

The analytical article "An analysis of the transportation industry in 2005" (11-621-MIE2006044, free) is now available in the *Analysis in Brief* series from the *Our products and services* page of our website.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Joseph Dunlavy (613-951-0193), Transportation Division. ■

Dairy statistics

April 2006 (preliminary)

Dairy farmers sold 623 600 kilolitres of milk and cream to dairies in April, down 2.4% from April 2005. Fluid milk sales stood at 237 300 kilolitres, and industrial milk sales at 386 300 kilolitres. Industrial milk is used to manufacture butter, cheese, yogurt, ice cream, milk powders and concentrates.

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

The second quarter 2006 issue of *The Dairy Review* (23-001-XIB, free) and the new publication *Dairy Statistics* (23-014-XIE, free) will be available in August.

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

Refined petroleum products

April 2006 (preliminary)

Data on the production, inventories and domestic sales of refined petroleum products are now available for April. 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 or toll-free 1-866-873-8789; energy@statcan.ca), Manufacturing, Construction and Energy Division. ■

Steel wire and specified wire products

April 2006

Data on steel wire and specified wire products production are now available for April.

Available on CANSIM: table 303-0047.

Definitions, data sources and methods: survey number 2106.

The April 2006 issue of *Steel, Tubular Products and Steel Wire* (41-019-XIE, free) will soon be available.

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

Analysis in Brief: "An analysis of the transportation industry in 2005", no. 44
Catalogue number 11-621-MIE2006044
(free).

Analytical Studies Branch Research Paper Series: "Incentive effects of social assistance: A regression discontinuity approach", no. 280
Catalogue number 11F0019MIE2006280
(free).

Survey of Household Spending Public-use Microdata File, 2004
Catalogue number 62M0004XCB (\$3,210).

Guide to the Analysis of the Workplace and Employee Survey, 2003
Catalogue number 71-221-GIE
(free).

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

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