



Informa

A Weekly Review

Friday, February 9, 2001

OVERVIEW

◆ Economic activity almost unchanged

November's gross domestic product was almost unchanged from October, edging up 0.1%. Slower North American demand for automotive products had a dampening effect on the economy.

◆ Manufacturers expect to cut production

In January, manufacturers of transportation equipment and primary metals expected to decrease production levels in the coming three months. They were also concerned about current levels of orders and finished product inventories.

◆ IPPI and RMPI post slower annual rates of increase

Lower monthly energy prices in December contributed to the lowest annual rate of increase in industrial prices since November 1999. Similarly, raw material prices were growing at their slowest pace since June 1999.

◆ Employees get higher weekly earnings

In November, average weekly earnings increased by 0.5% from October and by 2.9% from November 1999, to \$632.15.

◆ Medium and large firms: manufacturing outperforms all other sectors

A thriving manufacturing sector and rising commodity prices boosted corporate profits and profitability in 1999. The returns of large and medium firms rebounded after softening in 1998, and small firms saw a third straight year of profit growth.

Economic activity almost unchanged

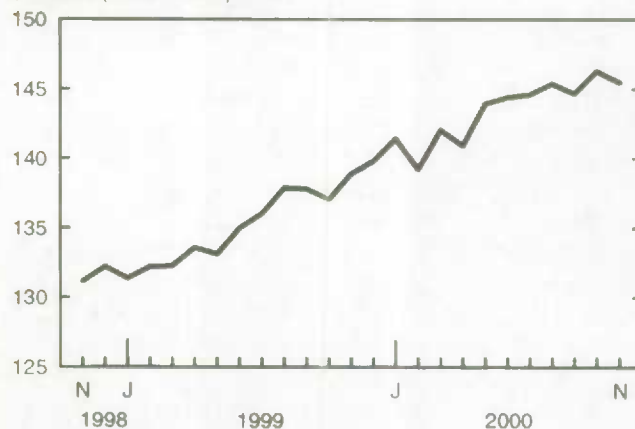
November's gross domestic product was little changed from October, edging up 0.1%. Economic growth slowed as the first wave of planned cutbacks in the production of automotive products was implemented, sparked by a slowdown in North American demand.

A sharp drop in the production of motor vehicles and parts led to the manufacturing sector's second decline in three months. In November, factory output declined 0.5%, continuing to fall short of the robust growth trend evident earlier in 2000. The fall in automotive output was reflected in international trade flows as well, with imports and exports of automotive products declining in November.

The high-flying electrical and electronic products industry curtailed production by 2.7%, also contributing to the decline in the manufacturing sector. This was the second decline in three months, and the steepest in more than two years. Output of communications equipment was hardest hit by the cutbacks. Production of computers and peripherals also fell. However,

Manufacturing output

\$ billions (1992 dollars)



(continued on page 2)

... Economic activity almost unchanged

demand for fibre optic cable remained strong. In the primary metal products industry, output was also down sharply, by 2.0%. This was partly due to the auto industry's difficulties.

Among the industries increasing their output, the chemical products industry registered a substantial 2.2% rise in November. The expansion of the pharmaceutical industry continued apace. That industry also saw a significant increase in imports of raw materials. Production of agricultural chemicals and synthetic resins also rose.

Flagging consumer demand for automotive products also contributed to the weak performance in the retailing and wholesaling industries in November. Wholesale sales declined 0.9%, driven down by weakness in computers and autos. These declines were partly offset by increases among wholesalers of food and non-farm machinery. Retailing activity was essentially unchanged, extending a period of lacklustre growth since July. Consumers stayed away from auto dealer showrooms for a second month. Department stores and most types of clothing stores also posted disappointing results. These declines were partly offset by increased traffic at service stations.

Elsewhere in the economy, the finance sector saw a 0.7% decline in activity in November; after three months of solid growth, it was shaken by the stock market tumble. Especially hard hit were the services of investment and mutual fund dealers.

However, the construction recovery continued into November. Construction activity rose 0.7%, reflecting continued growth in

Note to readers

Monthly gross domestic product is valued at 1992 prices. The estimates presented here are seasonally adjusted at annual rates.

housing demand and an increase in engineering construction. These gains were partly offset by a drop in the construction of non-residential buildings, the sixth in eight months.

At the same time, the economy drew strength from moderate gains in several service industries. Unseasonably colder weather in November led to higher output of electrical utilities. A surge in demand from the United States, caused by power shortages, also helped to boost their production. Business services advanced 0.4%, continuing their almost uninterrupted growth since the mid-1990s; computer services contributed the lion's share of November's gain in this industry. Increased activity by the telecommunications carrier and postal and courier industries were behind a 1.0% increase in the communications sector.

*The November 2000 issue of **Gross domestic product by industry** (Internet: 15-001-XIE, \$11/\$110; paper: 15-001-XPB, \$15/\$145) is now available. To purchase data, contact Yolande Chantigny (1 800 877-4623; imad@statcan.ca). For analytical information, contact Richard Evans (613-951-9145; evanric@statcan.ca), Industry Measures and Analysis Division. See also "Current trends" on page 8.*

Manufacturers expect to cut production

In January, 43% of manufacturers expected to decrease production in the first quarter, while only 15% expected to increase production. This is the first negative balance since July 1998. Manufacturers in the transportation equipment and primary metals industries accounted for almost all of the expected decrease in production. Recently, motor vehicle manufacturers announced measures to reduce production.

Manufacturers were also concerned about the level of orders received. The number reporting a drop in orders increased to 48% in January from 18% in October. Again, manufacturers in the transportation equipment and primary metal industries were the major contributors to the decrease.

The current level of unfilled orders was also a concern for manufacturers. In January, 35% of them said their level of unfilled orders was lower than normal, while only 11% said it was higher than normal. Manufacturers in the primary metals industry were the most concerned about their level of unfilled orders. According to the November Monthly Survey of Manufacturers, the value of unfilled orders has decreased 2.0% from the July 2000 peak of \$56.5 billion.

Note to readers

The Business Conditions Survey is conducted in January, April, July and October among about 4,000 manufacturers. Results are weighted by a manufacturer's shipments or employment. Consequently, larger manufacturers have a correspondingly larger impact on the results than do smaller manufacturers. Data presented here are seasonally adjusted, except for the data on production impediments.

However, the decline in production expectations and concerns about lower orders did not fully carry over into the employment intentions of manufacturers. In January, 81% of them planned to keep or add to their work force in the coming quarter, while 19% expected to decrease employment. By way of comparison, the proportion of those who intended to reduce their work force was 12% in October. The primary metals industry was the major contributor to January's modest decline in employment prospects. According to the December Labour Force Survey, employment in manufacturing was 2.7% higher than in December 1999.

On the other hand, finished products inventories were a growing concern among manufacturers. Thirty-one percent of manufacturers said the current level of their finished products inventory was too high, up from 17% in October.

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... Manufacturers expect to cut production

Few manufacturers reported impediments to production. In January, 78% reported little in the way of production impediments, compared with 80% in October. However, a shortage of skilled labour continued to be a concern for 9% of manufacturers. The proportion of manufacturers who reported other production

impediments rose from 4% in October to 7% in January. Some manufacturers also expressed concern over increasing energy prices and reduced demand.

For more information, contact Claude Robillard (613-951-3507; robilcg@statcan.ca), Manufacturing, Construction and Energy Division.

Manufacturers' expectations and business conditions

Seasonally adjusted

	January 2000	April 2000	July 2000	October 2000	January 2001
% of manufacturers who said					
Volume of production in next three months will be:					
About the same as in previous three months	47	54	62	65	42
Higher	39	32	25	19	15
Lower	14	14	13	16	43
Employment in next three months will:					
Change little from previous three months	72	75	74	71	64
Increase	17	15	16	17	17
Decrease	11	10	10	12	19
Backlog of unfilled orders is:					
About normal	81	79	78	71	54
Higher than normal	11	12	10	8	11
Lower than normal	8	9	12	21	35
Orders received are:					
About the same	62	62	71	70	38
Rising	29	30	17	12	14
Declining	9	8	12	18	48
Finished-product inventory is:					
About right	84	83	82	80	66
Too low	6	3	2	3	3
Too high	10	14	16	17	31

IPPI and RMPI post slower annual rates of increase

Lower monthly energy prices in December contributed to the lowest annual rate of increase in industrial prices since November 1999. Similarly, raw material prices were growing at their slowest pace since June 1999.

The prices of industrial products, as measured by the Industrial Product Price Index (IPPI), gained 3.5% from December 1999 to December 2000. This was a substantial slowdown from the rate of 5.2% in November and the recent peak of 6.1% in February 2000. Once again petroleum and coal product prices played a central role in December, accounting for close to half the annual increase. Prices for paper and paper products and motor vehicles also contributed to the increase, while falling prices for lumber had a dampening influence.

Between November and December, the prices of industrial products fell 0.9%, representing the second downturn in prices for 2000 and the largest monthly decline since March 1998. While most of the decline stemmed from the petroleum and coal product and motor vehicle categories, downward price pressure was common to more than half of the major categories.

The prices of raw materials, as measured by the Raw Materials Price Index (RMPI), were 6.3% higher than in December 1999. This followed a year-over-year increase of 19.1% in November. Mineral fuel prices were the primary force behind this increase in prices, but the prices of animal products, wood and vegetable products also played a role. From November to December, the prices of raw materials dropped 7.3%, pulled down by mineral fuel prices.

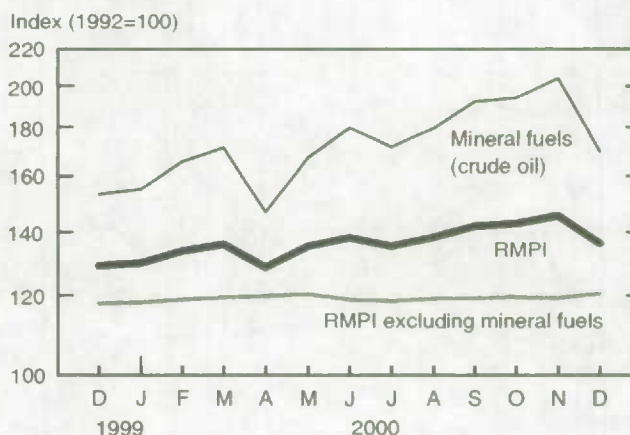
Industrial product and raw materials price indexes, December 2000

	Index (1992=100)	% change, previous month	% change, previous year
Industrial Product Price Index (IPPI)	128.9	-0.9	3.5
IPPI excluding petroleum and coal	126.1	-0.6	1.9
Intermediate goods	130.0	-0.8	3.6
Finished goods	127.2	-1.2	3.1
Raw materials Price Index (RMPI)	142.8	-7.3	6.3
RMPI excluding mineral fuels	124.6	1.2	2.7
Mineral fuels (crude oil)	182.3	-17.6	11.9
Vegetable products	119.8	1.7	6.6
Animals and animal products	121.2	2.0	4.1
Wood	142.0	0.0	4.1
Ferrous materials	111.7	-2.0	-11.1
Non-ferrous metals	118.7	2.1	-0.4
Non-metallic minerals	121.7	0.0	2.7

Note to readers

The Industrial Product Price Index (IPPI) reflects the prices that producers in Canada receive as the goods leave the plant gate. It does not reflect what the consumer pays. The Raw Materials Price Index (RMPI) reflects the prices paid by Canadian manufacturers for key raw materials. Many of these prices are set in a world market. Unlike the IPPI, the RMPI includes goods not produced in Canada.

Raw Materials Price Index



For 2000 as a whole, the prices of raw materials posted their largest annual average growth rate on record, 22.6%. This reflects a 62.6% surge in crude oil prices compared with 1999. The prices of industrial products rose 4.9%, the highest rate since 1995. With the surge in crude oil prices, petroleum and coal product prices rose 45.2%. This surpassed gains in any other year on record in the IPPI.

Concerns over low inventories continued throughout most of 2000, despite output increases from nations of the Organization of Petroleum Exporting Countries (OPEC). According to the American Petroleum Institute, crude oil inventories in November were 3.5% below those of November 1999 and the lowest for any November since 1975.

Among the other striking developments in 2000, pulp prices jumped 27.0% compared with 1999, propelled by robust demand. However, they remained well below the record average in 1995. The lumber market weakened, pulled down by a 16.1% drop in softwood lumber prices amid falling U.S. housing starts.

The December 2000 issue of *Industry price indexes* (paper: 62-011-XPB, \$22/\$217) will be available in February. For more information, contact Client Services (613-951-3350; fax: 613-951-1539; infounit@statcan.ca), Prices Division.

Employees get higher weekly earnings

Average weekly earnings for all employees increased by \$2.88, or 0.5%, in November from October, to \$632.15. Compared with November 1999, average weekly earnings increased 2.9%, or \$17.69.

By province, year-over-year average earnings growth was mostly in the 2% to 4% range. For the same period, earnings growth for employees in the services-producing sector (+3.1%) was slightly stronger than growth for goods-producing employees (+2.3%).

Average hourly earnings for hourly paid employees were \$15.58 in November, down three cents from October. Average weekly hours for these employees were 31.9, up 0.1 hours from October.

Payroll employment increased by 55,500 in November. This is the fourth month in a row with strong employment gains. The largest gain was in business services, followed by manufacturing, wholesale trade and construction. Payroll employment declined in retail trade. All provinces and territories gained employment in November; Quebec and British Columbia saw the largest increases.

Average weekly earnings, all industries, November 2000
Seasonally adjusted

	\$	% change, previous month	% change, previous year
Canada	632.15	0.5	2.9
Newfoundland	559.51	0.2	3.1
Prince Edward Island	498.23	0.9	4.2
Nova Scotia	531.79	1.1	2.7
New Brunswick	563.15	1.1	3.8
Quebec	592.16	0.6	3.3
Ontario	674.21	0.3	2.6
Manitoba	564.50	0.9	3.8
Saskatchewan	566.81	0.9	3.7
Alberta	649.36	0.8	3.6
British Columbia	638.72	0.3	2.1
Yukon	694.73	-0.1	0.2
Northwest Territories and Nunavut	830.66	0.6	5.0

The November 2000 issue of *Employment, earnings and hours* (Internet: 72-002-XIB, \$24/\$240; paper: 72-002-XPB, \$32/\$320) presents the full report. For more information, contact Jean Leduc or Robert Frindt (613-951-4090; fax: 613-951-4087; labour@statcan.ca), Labour Statistics Division.

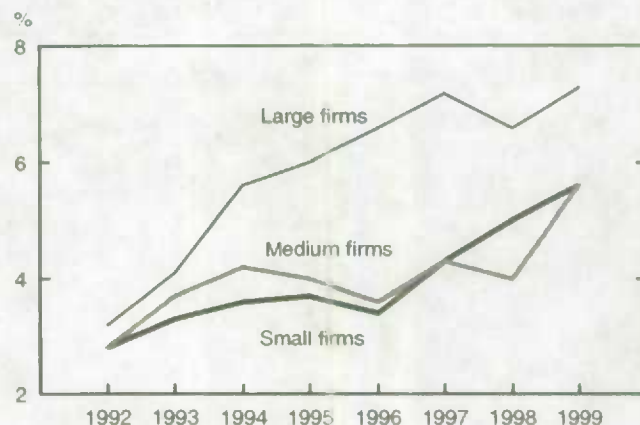
Medium and large firms: manufacturing outperforms all other sectors

Athriving manufacturing sector and rising commodity prices boosted corporate profits and profitability in 1999. The returns of large and medium firms rebounded after softening in 1998, and small firms saw a third straight year of profit growth.

Large firms continued to achieve higher rates of return than either medium or small firms, a trend that began after the 1991 recession. Large firms earned an average return on assets of 7.3% in 1999, up from 6.6% in 1998. Medium firms saw returns rise from 4.0% to 5.6%. For small firms, the average return on assets was 5.6% in 1999, a healthy increase compared with 5.0% in 1998 and 4.3% in 1997.

Among medium and large firms, manufacturing outpaced the other major sectors of the economy in returns on capital employed. Manufacturing posted progressively higher returns in each of the three years from 1997 to 1999. Returns reached 10.3% in 1999, as shipments surged to their strongest increase since 1995. Among medium and large firms in the services sector, those which provide travel services, such as travel agencies and tour operators, were the most profitable between 1997 and 1999.

Return on assets, non-financial industries



Among small firms, the services sector was the most profitable, with an average annual return on assets of 7.8% between 1997 and 1999. Manufacturing ranked a close second, with returns of 6.0%. These two sectors were also the best performers in 1999 alone, when firms in the services sector averaged returns of 9.0% and those in manufacturing managed 6.4%.

(continued on page 6)

... Medium and large firms: manufacturing outperforms all other sectors

In the services sector, small firms in the health care field remained the most profitable in the 1997-to-1999 period. Social services practitioners, excluding psychologists and social workers, topped the rankings for the third year in a row. In the goods-producing sector, four of the five most profitable industries were in manufacturing. However, the best-performing firms were those engaged in exterior close-in construction work, such as the installation of weatherstripping and caulking.

Medium and large firm industry ranking, 1997 to 1999

	Top five industries	Median return on capital employed (%)
Goods-producing sector		
Rubber products manufacturing (except tires and tubes)	1	16.7
Household appliances manufacturing	2	15.0
Motor vehicles and motor vehicle parts and accessories manufacturing	3	13.5
Logging	4	12.9
Other printing and publishing	5	12.8
Services sector		
Travel services	1	19.3
Computer and peripheral equipment sales and services	2	12.7
Other general merchandise retailing and services	3	12.7
Other chemicals and chemical products wholesaling not elsewhere classified	4	12.5
Recreational vehicles and other transportation equipment wholesaling	5	11.9

Note to readers

Return on assets was used to compare the performance of large, medium and small firms, as this was the best measure of profitability available for all three size groups. The specific measure used was pretax profit relative to total assets. Return on assets was also used to rank the most profitable industries for small firms. The measure used to rank the industries for large and medium firms was return on capital employed, which indicates the number of cents returned (net earnings) for every dollar of capital. All rankings were based on average annual returns for 1997 to 1999.

Large firms are those with annual revenue of more than \$75 million. Medium firms are those with revenue between \$5 million and \$75 million. Small firms are those with revenue between \$50,000 and \$5 million.

The profitability of the financial services sector improved somewhat in 1999, after a poor performance the previous year. As a result, the major banks posted the best overall results in the financial sector over the 1997-to-1999 period, with an 11.1% average annual return on capital employed. Following the banks were investment dealers that were subsidiaries of banks (9.9%) and independent investment dealers (9.2%).

The publication *Financial performance indicators for Canadian business* is now available on CD-ROM. To order, contact Jeannine D'Angelo (613-951-2604) or call the nearest Statistics Canada regional reference centre. For analytical information, contact Ed Hamilton (613-951-4310), Industrial Organization and Finance Division.

New from Statistics Canada

Retailing in Canada

1998

Retailing in Canada, 1998 includes a paper entitled "Changes in outputs of annual retail trade surveys." The first objective of the paper is to inform retail data users, industry analysts, trade associations and other stakeholders about changes to the annual retail trade surveys; the second is to seek input from stakeholders on possible data outputs.

Retailing in Canada, 1998 (Internet: 63-236-XIB, \$26) is now available. The paper "Changes in outputs of annual retail trade surveys" (Internet: 63F0022XIE, free) can be downloaded from Statistics Canada's Web site (www.statcan.ca). From the Products and services page, choose Research papers (free), then Trade. For more information, contact the Client Services (1 877 421-3067; 613-951-3549; retailinfo@statcan.ca), Distributive Trades Division.

Estimating the value of employer pension plan benefits

1999

Statistics Canada is inviting comments from clients by March 16 on the new report *Survey of Financial Security, Estimating the value of employer pension plan benefits: A discussion paper*. This report proposes a methodology for putting a value on employer pension plan benefits in relation to the Survey of Financial Security.

The intention is to refine this initial estimate of net worth by adding to it an estimate of the value of benefits accrued in employer pension plans. This is an important addition to any asset and debt survey, as it will be the largest asset for many families.

The report *Survey of Financial Security, estimating the value of employer pension plan benefits: A discussion paper* (Internet: 13F0026MIE01002, free) is available on Statistics Canada's Web site (www.statcan.ca). From the Products and services page, choose Research papers (free), then Personal finance and household finance, then Asset and debt research paper series. For more information, contact Client Services (1 888 297-7355; 613-951-7355; income@statcan.ca), Income Statistics Division.

Rural youth migration

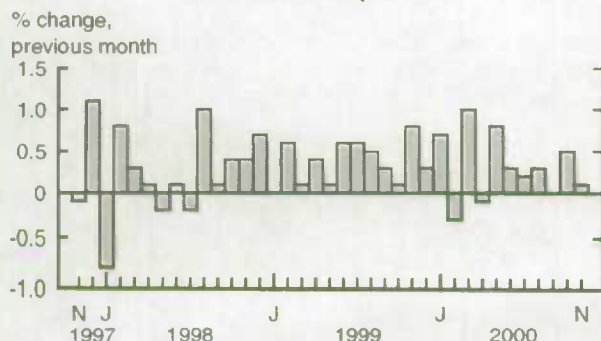
1971 to 1996

The analysis bulletin *Rural youth migration between 1971 and 1996*, published in collaboration with the Rural Secretariat of Agriculture and Agri-Food Canada, is the 11th in a series that profiles trends in rural Canada. It uses census data to show the extent of migration of youth out of rural areas between 1971 and 1996, at the national and provincial levels. The greatest net outflow occurred in Saskatchewan and in the four Atlantic provinces, particularly Newfoundland and Prince Edward Island.

The analysis bulletin *Rural youth migration between 1971 and 1996* (Internet: 21-006-XIE, free) is now available on Statistics Canada's Web site (www.statcan.ca). On the Products and services page, choose Free Publications, then Agriculture. To order data, or for general information, call 1 800 465-1991. For more information, contact Ray D. Bollman (613-951-3747; fax: 613-951-3868; bollman@statcan.ca), Agriculture Division.

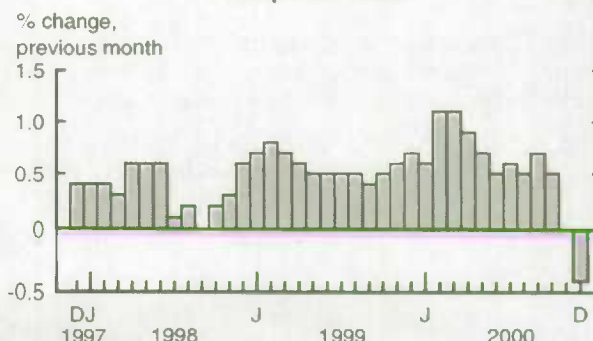
Current trends

Gross domestic product



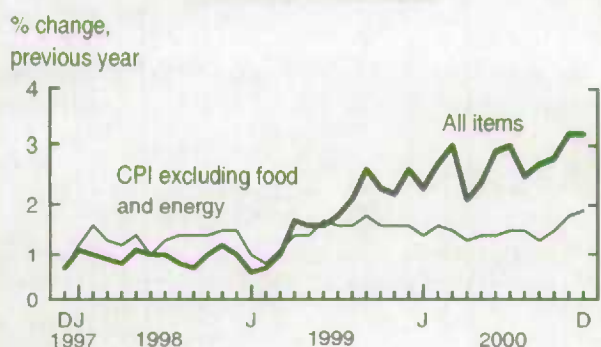
November's gross domestic product was little changed, edging up 0.1% from October, due to slower North American demand for automotive products.

Composite Index



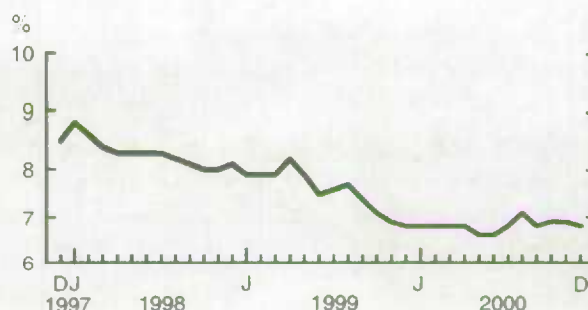
The leading indicator fell by 0.4% in December, its first dip since 1995. Half of the drop originated in the stock market.

Consumer Price Index



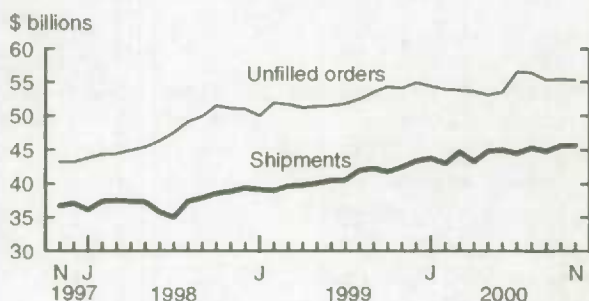
Consumer prices for goods and services were 3.2% higher in December 2000 than they were a year earlier, as they were in November. Excluding food and energy, prices rose 1.9%.

Unemployment rate



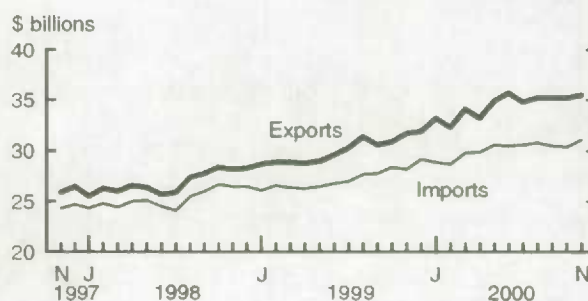
In December, the unemployment rate dipped 0.1 percentage points to 6.8%, ending the year where it began.

Manufacturing



Manufacturers' shipments increased by 0.3% in November to \$45.7 billion. The backlog of unfilled orders edged down 0.1% to \$55.3 billion.

Merchandise trade



In November, the value of merchandise exports rose 0.8% to \$35.5 billion. Imports, which increased at almost three times the pace of exports, were up 2.2% to \$31.1 billion.

Note: All series are seasonally adjusted except the Consumer Price Index.

Latest statistics

	Period	Level	Change, previous period	Change, previous year
GENERAL				
Gross domestic product (\$ billion, 1992)	November	797.0	0.1%	3.7%
Composite Index (1992=100)	December	166.6	-0.4%	7.0%
Operating profits of enterprises (\$ billion)	Q3 2000	52.6	0.1%	15.7%
Capacity utilization (%)	Q3 2000	86.9	-0.1†	1.5†
DOMESTIC DEMAND				
Retail trade (\$ billion)	November	23.4	0.4%	6.1%
Department store sales (\$ billions)	December*	1.57	3.3%	9.8%
New motor vehicle sales (thousands of units)	November	127.3	3.4%	-3.3%
Wholesale trade (\$ billion)	November	31.7	-0.7%	2.1%
LABOUR				
Employment (millions)	December	15.07	0.2%	2.2%
Unemployment rate (%)	December	6.8	-0.1†	0.0†
Participation rate (%)	December	66.2	0.1†	0.6†
Average weekly earnings (\$)	November	632.15	0.5%	2.9%
Help-wanted Index (1996=100)	January*	177	-2.2%	4.7%
INTERNATIONAL TRADE				
Merchandise exports (\$ billion)	November	35.5	0.8%	12.2%
Merchandise imports (\$ billion)	November	31.1	2.2%	10.1%
Merchandise trade balance (all figures in \$ billion)	November	4.5	-0.4	1.0
MANUFACTURING				
Shipments (\$ billion)	November	45.7	0.3%	7.5%
New orders (\$ billion)	November	45.6	-0.1%	7.9%
Unfilled orders (\$ billion)	November	55.3	-0.1%	2.3%
Inventory/shipments ratio	November	1.35	0.01	0.05
PRICES				
Consumer Price Index (1992=100)	December	115.1	0.1%	3.2%
Industrial Product Price Index (1992=100)	December	128.9	-0.9%	3.5%
Raw Materials Price Index (1992=100)	December	142.8	-7.3%	6.3%
New Housing Price Index (1992=100)	November	104.3	0.4%	2.5%

Note: All series are seasonally adjusted with the exception of the price indexes.

* new this week

† percentage point

Infomat

A weekly review

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Products released from February 1 to 7, 2001

SUBJECT AREA Title of product	Period	Catalogue number	Price (\$) (issue/subscription)
AGRICULTURE			
Cereals and oilseeds review	November 2000	22-007-XIB	11/112
Cereals and oilseeds review	November 2000	22-007-XPB	15/149
Production of eggs	December 2000	23-003-XPB	110
Rural youth migration between 1971 and 1996	1971 to 1996	21-006-XIE	no charge
ANALYTICAL STUDIES			
Female employment rates and labour market attachment in rural Canada		11F0019MIE00153	no charge
Female employment rates and labour market attachment in rural Canada		11F0019MPE00153	5
BALANCE OF PAYMENTS AND FINANCIAL FLOWS			
Canada's international transactions in securities	November 2000	67-002-XPB	18/176
DISTRIBUTIVE TRADES			
Changes in outputs of annual retail trade surveys		63F0022XIE	no charge
Retail chain and department stores	1998	63-210-XIB	30
Retailing in Canada	1998	63-236-XIB	26
INCOME AND EXPENDITURE ACCOUNTS			
Estimates of labour income	November 2000	13F0016XDB	250/1,000
Estimates of labour income, tables and analytical document	November 2000	13F0016XPB	20/200
INCOME STATISTICS			
Survey of financial security, estimating the value of employer pension plan benefits: A discussion paper	1999	13F0026MIE01002	no charge
INDUSTRIAL ORGANIZATION AND FINANCE			
Financial and taxation statistics for enterprises	1998	61-219-XPB	57
Quarterly financial statistics for enterprises	Q3 2000	61-008-XPB	35/114
INDUSTRY MEASURES AND ANALYSIS			
Gross domestic product by industry	November 2000	15-001-XIE	11/110
INTERNATIONAL TRADE			
Exports by commodity	November 2000	65-004-XMB	37/361
Exports by commodity	November 2000	65-004-XPB	78/773
MANUFACTURING, CONSTRUCTION AND ENERGY			
Cement	December 2000	44-001-XIB	5/47
Coal and coke statistics	November 2000	45-002-XIB	9/85
Electric power statistics	November 2000	57-001-XIB	9/85
Monthly Survey of Manufacturing	November 2000	31-001-XIB	15/147
Natural gas transportation and distribution	October 2000	55-002-XIB	13/125
Refined petroleum products	September 2000	45-004-XIB	16/155
Refined petroleum products	September 2000	45-004-XPB	21/206
Steel wire and specified wire products	November 2000	41-006-XIB	5/47
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