



informat

A Weekly Review

Friday, June 22, 2001

OVERVIEW

◆ Food, energy costs push inflation to decade high

Consumers faced a 3.9% average increase in May compared with May 2000 in the prices of the goods and services in the Consumer Price Index basket. This is the largest increase since November 1991.

◆ Fourth decline in manufacturing shipments in six months

Manufacturing shipments fell back 0.6% in April, losing some of the ground gained in March. The computer and electronic products industry led the decline.

◆ New motor vehicle sales post strongest growth in year

In April, new motor vehicles sales were up 5.9% from March, the largest monthly increase since December 1999. Both passenger cars and trucks contributed to this increase.

◆ Government finances swing to strong surplus

The fiscal pendulum swung to a strong government surplus of \$25.7 billion in 2000/01, in tandem with robust growth in the economy. This has contributed to a \$70.9 billion shift in government finances over the last six years.

◆ Robust revenue growth for couriers, local messengers

As in 1997 and 1998, the revenue of courier and local messenger businesses grew by a hefty 9% in 1999. This growth was accompanied by a 14% increase in operating margin.

◆ Canadians eating more cereal products

In 2000, Canadians continued to include more cereal products and lower-fat varieties of milk in their diets. Their consumption of coffee and tea also increased.

Food, energy costs push inflation to decade high

Consumers faced a 3.9% average increase in May compared with May 2000 in the prices of the goods and services in the Consumer Price Index (CPI) basket. This surpasses April's rise of 3.6% and is the largest increase since November 1991.

Energy prices accounted for more than one-third of the All-items annual increase in May. After an 11.6% increase in April, energy prices advanced 16.0%. All energy components were up on an annual basis, but most of the upward price pressure was the result of a record 67.4% jump in natural gas prices and a 12.0% rise in gasoline prices. Increases in natural gas prices ranged between 25.8% in Saskatchewan and 85.8% in Alberta. The All-items index excluding energy rose 2.7%.

A 5.2% rise in food prices accounted for close to one-quarter of the increase in the All-items index in May. In particular, beef prices were 19.2% higher than in May 2000, reflecting continued weak supplies. Inclement weather was among the factors contributing to an 18.7% climb in fresh fruit prices. Poor weather also contributed to the 11.8% rise in fresh vegetable prices, as did higher production and transportation costs.

Consumer Price Index, May 2001

% change, previous year, not seasonally adjusted

	All items	Food	Shelter	Transportation	Energy
Canada	3.9	5.2	5.6	3.2	16.0
Newfoundland	3.0	4.4	2.9	2.1	6.1
Prince Edward Island	3.1	3.8	3.4	3.5	7.7
Nova Scotia	3.1	2.6	3.6	4.3	8.7
New Brunswick	3.1	2.9	1.6	5.0	7.8
Quebec	3.8	5.7	2.8	4.0	8.9
Ontario	4.2	5.6	6.4	2.8	19.0
Manitoba	4.1	5.1	5.7	3.5	17.5
Saskatchewan	3.6	3.2	5.9	3.5	12.9
Alberta	5.7	5.2	12.8	4.0	33.6
British Columbia	2.5	4.4	3.7	1.6	13.1
Whitehorse	2.3	5.4	2.7	-0.1	6.6
Yellowknife	1.4	4.1	1.1	0.8	2.2

(continued on page 2)



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... Food, energy costs push inflation to decade high

On a monthly basis, the CPI rose 0.9% in May, outpacing April's 0.7% advance to be the largest monthly increase since January 1991. Much of the upward price pressure on the All-items index came from Alberta's 3.6% monthly rise.

Gasoline prices advanced 5.4% in May after rising 5.5% in April, owing to increasing North American demand at the start of the peak summer season. The impact was greatest on the Prairies. Natural gas prices climbed 14.6%. Most of the advance came from Alberta, where the discontinuation of the provincial government credit resulted in a 121.7% jump in prices.

Travellers faced price increases of 7.3% for accommodation, as many hotels introduced their summer rates. The impact of higher taxes on cigarettes continued into May, causing cigarette prices to rise 3.3%. Fresh fruit prices continued to rise (+4.5%),

largely on the strength of prices for oranges and for the other fresh fruit category. Prices for homeowner maintenance and repairs increased 2.1%, largely owing to higher material prices.

Partially offsetting these increases, women's clothing prices continued to drop in May (-4.0%), after falling 2.7% in April. Prices for men's clothing fell 0.9%. Seasonal sales for men's clothing were not as widespread or as sizable as for women's clothing.

The May 2001 issue of the Consumer Price Index (Internet: 62-001-XIB, \$8/\$77; paper: 62-001-XPB, \$11/\$103) is now available. For more information, call 613-951-9606 (fax: 613-951-1539; infounit@statcan.ca) or contact Joanne Moreau (613-951-7130), Prices Division. (See also "Current trends" on page 8.)

Fourth decline in manufacturing shipments in six months

Manufacturing shipments fell 0.6% in April to \$43.4 billion, losing some of the ground gained in March. Shipments, which decreased in four of the previous six months, were 5.8% below their October 2000 peak. Many manufacturers continued to face the challenges of weaker product demand and high inventory levels in April. Contract cancellations, production slowdowns and layoffs have affected the manufacturing sector as a whole in 2001.

Following March's brief resurgence in activity, computer and electronic product manufacturers reported a 6.0% decrease in shipments for April. Shipments, at \$2.5 billion, were at their lowest level since October 1999. Shipments of petroleum and coal products fell 4.7% in April. For paper manufacturers, a 1.9% decline in paper prices contributed to a 3.5% drop in shipments.

These declines were partly offset by increases in motor vehicle and wood products industries in April. In the motor vehicle industry, shipments rose 3.2% to \$5.4 billion. Despite this increase, shipments remained 14% below their October 2000 peak. The 4.0% increase in wood product shipments follows two consecutive months of decline, and was partly due to a 1.2% rise in prices for lumber, sawmill and other wood products. The Canada-United States softwood lumber agreement expired at the end of March.

Inventories, totalling \$65.1 billion in April, remained largely unchanged for the third consecutive month, after steadily increasing over the previous two years. In recent months, manufacturers have adjusted their production levels to curb inventory expansion. The computer and electronic products industry reported a decline (-1.6%) in inventories in April; inventories in the petroleum and coal products industry also dropped (-4.6%). These decreases were offset by a 1.8% increase in the aerospace product and parts industry. After decreasing in March, the inventory-to-shipment ratio edged up to 1.50.

Manufacturers' shipments, April 2001
Seasonally adjusted

	\$ millions	% change, previous month
Canada	43,391	-0.6
Newfoundland	180	3.3
Prince Edward Island	99	0.4
Nova Scotia	727	-1.5
New Brunswick	1,036	5.4
Quebec	9,979	-3.6
Ontario	23,225	1.1
Manitoba	977	-0.3
Saskatchewan	590	-7.2
Alberta	3,635	-3.6
British Columbia	2,937	-0.5
Yukon, Northwest Territories and Nunavut	4	11.1

Unfilled orders, which have followed a downward trend since the end of 2000, posted a slight 0.2% increase to \$48.9 billion in April. In 2001, unfilled orders have fluctuated, largely because of variations in the aerospace products and parts industry. In April, orders in the aerospace industry gained 2.1%. Excluding the aerospace products and parts industry, unfilled orders decreased 1.1%, largely owing to the 7.0% decrease in the computer and electronic products industry.

New orders moved up 1.7% in April to \$43.5 billion, again due primarily to increases in the aerospace products and parts industry.

The April 2001 issue of Monthly Survey of Manufacturing (Internet: 31-001-XIB, \$15/\$147) is now available. More detailed data for shipments by province may be available on request. To order data, contact the Dissemination Officer (1 866 873-8789; 613-951-9497; manufact@statcan.ca). For analytical information, contact Craig Kuntz (613-951-7092; kuncrai@statcan.ca), Manufacturing, Construction and Energy Division. (See also "Current trends" on page 8.)

New motor vehicle sales post strongest growth in year

In April, dealers sold 134,372 new motor vehicles, up 5.9% from March. This increase, the largest since December 1999, was the fifth in six months. Sales were stimulated in part by incentives offered by some automobile manufacturers seeking to recapture lost market share. April's gain marks a turnaround in new motor vehicle sales, following a downward trend that began in the fall of 2000. However, April's sales were 3.6% short of the peak reached in September 2000.

The increase recorded in April is attributable to sales of both new passenger cars and trucks. After increasing in March, the number of new cars sold rose 5.8% to 71,328. Both North American-built passenger cars (+5.4%) and those built overseas (+7.0%) contributed to April's sales gain. The increases observed in March and April ended the downward movement in new passenger car sales since the fall of 2000.

As with passenger cars, new truck sales advanced for a second straight month in April, rising 5.9% to 63,044 vehicles sold. This increase followed a period of fairly stable sales in recent months.

The average selling price, unadjusted for seasonality, of a new vehicle in April was \$27,925, a price practically unchanged (-0.2%) from April 2000. Over the same one-year period, the average price of a new truck (excluding most heavy trucks and buses) rose 1.4% to \$32,417. The average price of new passenger cars was \$24,422, down 1.8% from the same month in 2000.

North American-built cars sold for an average of \$23,571 in April, down 0.9% from April 2000. The average price of these cars has remained relatively stable since the fall of 1999. New overseas-built passenger cars sold for \$26,522, down 5.6%. The average price of these cars is subject to some volatility.

The number of new motor vehicles sold in April was up in all provinces except Newfoundland. In that province, sales declined 0.4% after surging 18.8% in March. New motor vehicle sales have stabilized in recent months in Newfoundland.

The largest gain occurred in Manitoba (+16.6%). Despite this gain, new motor vehicle sales in Manitoba were more or less at the same level as at the start of 1999. The second largest increase occurred in New Brunswick (+11.8%). This halted a downward trend in sales that began in the fall of 1999. Quebec (+6.6%), Prince Edward Island (+6.1%) and Ontario (+6.0%) also posted

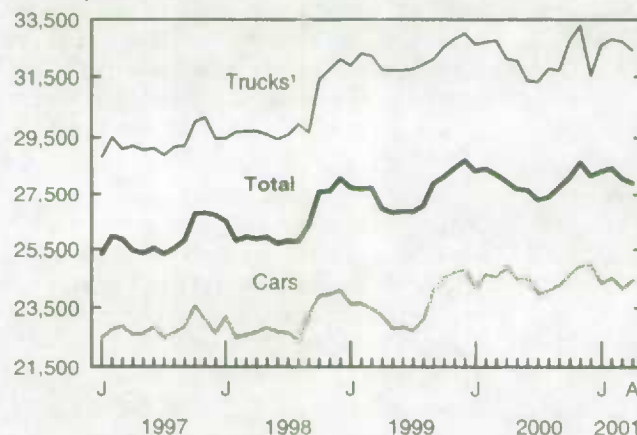
Note to readers

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.

Average price of new motor vehicles

\$. unadjusted data



* Data do not include most heavy trucks and buses.

gains above the national average. For Quebec and Prince Edward Island, this was the second consecutive increase; for Ontario, April's gain followed two successive declines.

The April 2001 issue of *New motor vehicle sales* (Internet: 63-007-X1B, \$13/\$124) is now available. For data or general information, contact Client Services (1 877 421-3067; 613-951-3549; retailinfo@statcan.ca). For analytical information, contact Clérance Kimanyi (613-951-6363; kimacle@statcan.ca), Distributive Trades Division.

Government finances swing to strong surplus

The fiscal pendulum swung to a strong government surplus of \$25.7 billion in 2000/01, in tandem with robust growth in the economy. This has contributed to a \$70.9 billion shift in government finances over the last six years. For a fourth consecutive year, the federal government posted a surplus, which amounted to \$9.1 billion.

Provincial and territorial governments recorded a surplus of \$11.4 billion in 2000/01, up from \$2.2 billion in 1999/2000. Seven provinces and territories registered surpluses. Alberta's surplus was the largest, at almost \$7.8 billion, followed by Quebec (\$2.4 billion) and British Columbia (\$681 million). From 1995/96 to 2000/01, Alberta, Quebec, Ontario and Prince Edward Island recorded the largest growth in revenues. On the spending side, the smallest growth in expenditures over this five-year period was seen in Yukon, Newfoundland, Ontario and New Brunswick.

However, local governments posted a deficit of \$443 million in the financial year ending in December 2000, down from a surplus of \$2.5 billion in 1999. Local governments in five provinces and three territories posted deficits. The largest deficit was incurred by local governments in Ontario, where spending surpassed revenue by \$889 million. On the other hand, those in Alberta posted the largest surplus, which amounted to \$428 million.

Consolidated government revenues were \$464.6 billion in 2000/01, up 31.8% from 1995/96. While federal revenues rose 33.2% and provincial and territorial revenues 26.1%, local government revenues increased only 7.7%. By comparison, gross domestic product grew 31% over the same period.

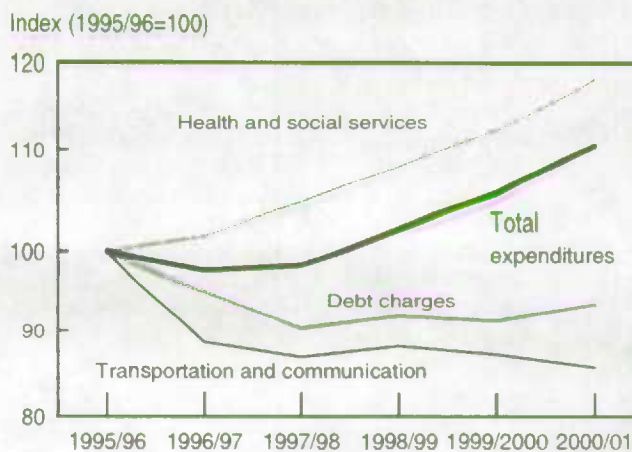
Consolidated government expenditures increased at a much slower pace over the five-year period, rising 10.4% to total \$438.9 billion in 2000/01. Federal spending rose 3.4%, provincial and territorial spending 13.5%, and local government spending, 8.6%.

Services provided to the public, which exclude debt charges, reached \$380.9 billion in 2000/01, or \$12,390 per capita, an 8.4% increase over 1995/96. After accounting for inflation, this represents a 1.6% increase. Spending on debt charges declined significantly, falling 6.6% to \$57.9 billion. This decrease was due mostly to lower long-term interest rates. Spending on debt charges fell substantially at the federal and local government levels but stayed relatively constant for provincial and territorial governments.

Note to readers

The Financial Management System (FMS) is used to produce the government financial statistics presented in this article. FMS standardizes individual governments' accounts to provide consistent and comparable statistics. As a result, FMS statistics may differ from the figures published in individual governments' financial statements.

Consolidated government expenditures by function



Wages and salaries paid by governments reached \$101.1 billion in 2000, up 6.1% from 1999. This amount, which included \$2.2 billion of pay equity payments to federal government employees, accounted for 23% of all government expenditures. Government payrolls also represented 19% of all wages and salaries paid to salaried employees in Canada in 2000, compared with 22% in 1995.

There were 83 government employees per 1,000 people in 2000, the same number as in 1969. The highest level was recorded in 1991, 97 employees per 1,000.

For more information, contact Joanne Rice (613-951-4354; joanne.rice@statcan.ca), Public Institutions Division.

Robust revenue growth for couriers, local messengers

Operating revenue of courier and local messenger businesses increased again in 1999 by a significant amount. It reached \$4.6 billion, up from \$4.3 billion in 1998 and \$3.9 billion in 1997. This represents consecutive annual increases of 9% from 1997 to 1999. By comparison, the overall Canadian economy rose in a range of 3% to 5% over the same period.

In 1999, the rapid growth in operating revenue was accompanied by an increase of \$45 million, or 14%, in operating margin. This contrasts with 1998, when the strong increase in operating revenue was outpaced by expenses, resulting in an 11% decrease in operating margin. However, operating margins of courier businesses increased significantly more than those of local messengers (18% compared with 6%), even though their operating revenue actually increased slightly less than that of local messengers (9% compared with 10%).

A similar difference exists based on the size of the courier or local messenger business. Large businesses (annual revenue larger

than \$25 million) and medium businesses (annual revenue between \$1 million and \$25 million) saw their operating margins increased by 23% and 76% respectively from 1998 to 1999. On the other hand, the operating margin of smaller businesses (annual revenue below \$1 million) fell 7%.

In 1999, large and medium-sized couriers and local messenger businesses generated \$3.7 billion in revenue from the delivery of 520 million pieces (letters, boxes and parcels), for an average of \$7.28 per piece. Next-day and overnight services accounted for 55% of their total delivery revenue while accounting for 41% of the total number of pieces. Delivery revenue from shipments destined for the Canadian market accounted for 80% of total operating revenue, while delivery revenue from shipments destined for the United States accounted for 15% and for other countries, 5%.

*A special article, including an analytical text, data tables and graphs, will be available in a few weeks in the **Surface and marine service bulletin** (Internet: 50-002-XIB, \$10). To obtain data, contact Jean-Robert Larocque (613-951-2486; larocque@statcan.ca), Transportation Division. For analytical information, contact Robert Masse (613-951-0365; massrob@statcan.ca), Transportation Division.*

Canadians eating more cereal products

According to per-capita food consumption data, Canadians are eating more pasta, specialty and multi-grain breads, and cereal-based snacks. As a result, consumption of cereal products increased to almost 89 kilograms per person in 2000, up from 74 kilograms in 1990. Wheat flour accounted for just over 80% of all cereal products consumed.

Although consumers have shifted away from high-fat milk and butter, it appears that this shift has moderated. Following steady declines during the 1990s, consumption of fluid milk rebounded slightly in 2000 to 88 litres per person, up from just over 87 litres in 1999. Lower-fat varieties such as 1% and skim milk accounted for more than 29% of all milk consumed in 2000, more than double the level at the start of the 1990s.

Butter consumption has stabilized, after dipping to historical lows in the late 1990s. In 2000, each Canadian ate nearly 3 kilograms of butter, slightly below 1999 levels but above the record low level of only 2.5 kilograms in 1997. Cheese consumption stood at about 12 kilograms per person in 2000, consistent with trends in the 1990s.

Note to readers

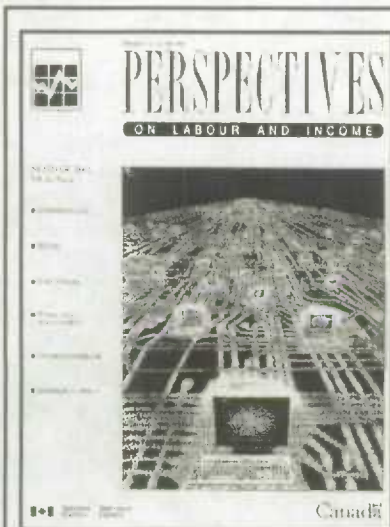
The data presented here represent food available for consumption. They do not represent actual quantities of food consumed because they do not allow for losses.

The data also reflect changes in lifestyle patterns. For example, the growing number of coffee shops featuring traditional and specialty coffees has fuelled an increase in coffee consumption. In 2000, each Canadian drank just over 101 litres of coffee, up from 99 litres in 1999 and 96 litres in 1990.

After declining in the early 1990s, tea consumption is on the rise, probably in response to the growing availability of specialty teas and literature promoting the health benefits of tea. In 2000, Canadians sipped just over 70 litres per person, up from almost 68 litres in 1999 and only 42 litres in 1990.

***Food consumption in Canada, Part 1** (Internet: 32-229-XIB, \$26; paper: 32-229-XPB, \$35) will be available in July. For more information, contact Debbie Dupuis (1 800 465-1991; 613-951-2553; fax: 613-951-3868) or Sandra Falcone (613-951-8726), Agriculture Division.*

New from Statistics Canada



Perspectives on labour and income Summer 2001

The feature article in the summer issue of *Perspectives on labour and income*, "Working with computers," looks at the extent of computer use by Canadian workers. The second article profiles repeat users of Employment Insurance, while another analyses which people were most likely to have had low income for several years. An update of trends in part-time work and an analysis of pension coverage and retirement savings complete the set of articles this quarter. Rounding out this issue is a fact sheet on gambling. These brief updates, begun this issue, will highlight recent statistics and trends on several popular themes.

The Summer 2001 issue of *Perspectives on labour and income*, Vol. 13, no. 2 (paper: 75-001-XPE, \$18/\$58) is now available. For more information, contact Henry Pold (613-951-4608; henry.pold@statcan.ca), Labour and Household Surveys Analysis Division.

Education at a glance 2001

The Organisation for Economic Co-operation and Development (OECD) has published *Education at a glance: OECD indicators*, 2001 Edition. The report presents an updated range of internationally comparable OECD education indicators.

The indicators in this volume represent the consensus of professional thinking on how to measure the current state of education world-wide. The thematic organization of the volume and the background information accompanying the tables and charts make this publication a valuable resource for anyone interested in analysing education systems across countries.

The report is available on the OECD's Web site (www.oecd.org). For more information, contact Client Services (1 800 307-3382; 613-951-7608; fax: 613-951-9040; educationstats@statcan.ca), Culture, Tourism and the Centre for Education Statistics.

Canadian Centre for Justice Statistics profile series 1999

This series of 10 profiles analyses the experiences of various groups as victims and offenders in the criminal justice system, as well as their perceptions of the criminal justice system. The profiles are based on Statistics Canada sources and include a mix of demographic, economic and justice data as well as information specific to each group.

The groups profiled are Aboriginal people; visible minorities, people with disabilities, people with literacy problems, people with low incomes, children and youth, immigrants, religious groups, seniors and women.

Canadian Centre for Justice Statistics profile series (Internet: 85F0033MIE, free) is now available on Statistics Canada's Web site (www.statcan.ca). From the "Our products and services page," choose "Free publications," then "Justice." For more information, contact Information and Client Services (1 800 387-2231; 613-951-9023), Canadian Centre for Justice Statistics.

New from Statistics Canada

Employment dynamics

1997/98

Employment dynamics is a compilation of statistical tables on employment, payroll and the number of businesses with employees for Canada, the provinces and territories. Primarily, the tables are used to analyse how businesses of different sizes contribute to employment change. The data provide approximate measures for the entry and exit of employers and lend insight into how employer firms create and shed jobs.

Employment dynamics on CD-ROM (61F0020XCB, \$500) is now available for reference period 1997/98. For more information, contact Jamie Brunet (613-951-6684; jamie.brunet@statcan.ca), Small Business and Special Surveys Division.

Inter-corporate ownership

Second quarter 2001

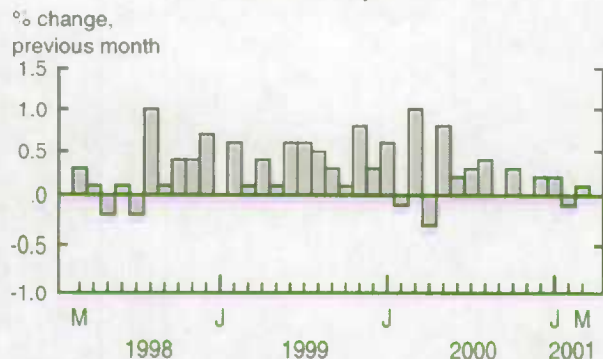
The inter-corporate ownership database tracks the ownership of the largest Canadian corporations and provides up-to-date information reflecting recent corporate mergers and takeovers and other substantial changes.

The database now lists more than 85,000 corporations. Users can search, sort, evaluate and download data by company name, company types, Standard Industrial Classification (SIC) code, province or country of ownership, and more. It also allows users to cross-tabulate a search by selecting different variables.

Inter-corporate ownership on CD-ROM (61-517-XCB) is now available. An annual subscription with quarterly updates is \$995; a single copy without updates is \$350. The *Inter-corporate ownership 2000* directory is also available (paper: 61-517-XPB, \$350). For information, contact Jeannine D'Angelo (613-951-2604), Industrial Organization and Finance Division.

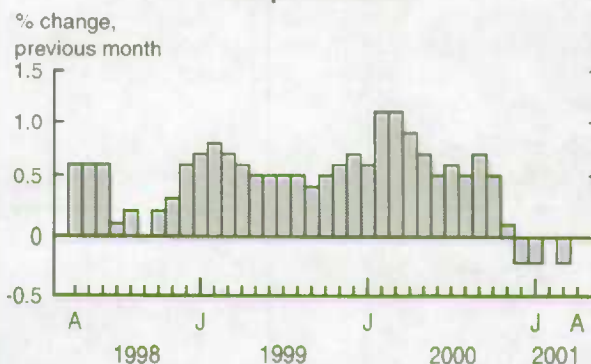
Current trends

Gross domestic product



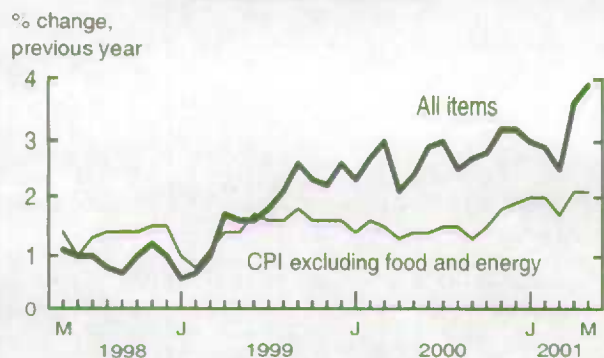
Gross domestic product edged up 0.1% in March, offsetting a similar-sized decline in February.

Composite Index



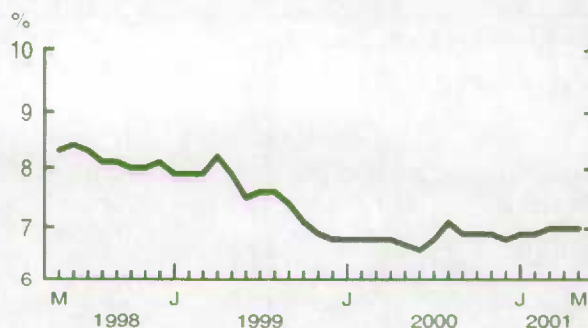
Following a decline in March, the leading indicator was unchanged in April. This was the fifth straight month without growth.

Consumer Price Index



Consumer prices for goods and services were 3.9% higher in May than they were a year earlier. Excluding food and energy, prices rose 2.1%.

Unemployment rate



In May, the unemployment rate stood at 7.0% for the third consecutive month.

Manufacturing



Manufacturers' shipments fell back 0.6% in April to \$43.4 billion. The backlog of unfilled orders posted a slight 0.2% increase to \$48.9 billion.

Merchandise trade



In March, the value of merchandise exports increased 2.3% to just over \$36.0 billion. Imports rose 1.7% to \$29.9 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 (\$ billions, 1992)	March	797.5	0.1%	2.0%
Composite Index (1992=100)	May*	166.2	0.0%	2.2%
Operating profits of enterprises (\$ billions)	Q1 2001	44.9	-6.9%	-9.7%
Capacity utilization (%)	Q1 2001	84.1	-1.0†	1.5†
DOMESTIC DEMAND				
Retail trade (\$ billion)	March	23.7	0.3%	3.8%
Department store sales (\$ billions)	April	1.64	0.6%	9.4%
New motor vehicle sales (thousands of units)	April	134.4	5.9%	1.1%
Wholesale trade (\$ billion)	April*	31.9	-0.9%	1.4%
LABOUR				
Employment (millions)	May	15.11	0.1%	1.5%
Unemployment rate (%)	May	7.0	0.0†	0.3†
Participation rate (%)	May	66.1	0.0†	0.3†
Average weekly earnings (\$)†	March	662.75	0.3%	2.1%
Help-wanted Index (1996=100)	May	164	-2.4%	-4.1%
INTERNATIONAL TRADE				
Merchandise exports (\$ billions)	March	36.0	2.3%	5.5%
Merchandise imports (\$ billions)	March	29.9	1.7%	0.1%
Merchandise trade balance (all figures in \$ billions)	March	6.2	0.3	1.8
MANUFACTURING				
Shipments (\$ billions)†	April*	43.4	-0.6%	0.4%
New orders (\$ billions)†	April*	43.5	1.7%	-0.1%
Unfilled orders (\$ billions)†	April*	48.9	0.2%	2.4%
Inventory/shipments ratio†	April*	1.50	0.01	0.09
PRICES				
Consumer Price Index (1992=100)	May*	117.4	0.9%	3.9%
Industrial Product Price Index (1992=100)	April	130.3	0.2%	2.7%
Raw Materials Price Index (1992=100)	April	144.4	0.1%	7.9%
New Housing Price Index (1992=100)	March	105.2	0.3%	2.6%

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

* new this week

† percentage point

† These estimates are now based on the North American Industry Classification (NAICS). They are not comparable to the previously published estimates based on the Standard Industrial Classification (SIC) of 1980.

Infomat

A weekly review

Editor: Caroline Olivier; (613) 951-1189; caroline.olivier@statcan.ca

Head of Official Release: Madeleine Simard; (613) 951-1088;
madeleine.simard@statcan.ca

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Title of product

Period

number

Price (\$)

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2000

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New motor vehicle sales

April 2001

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INCOME STATISTICS

Survey of Labour and Income Dynamics public-use microdata file

1998

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