



# Infommat

## A Weekly Review

Friday, August 31, 2001

### OVERVIEW

#### ◆ Inflation continues to decelerate

The prices of goods and services included in the Consumer Price Index (CPI) rose 2.6% from July 2000 to July 2001, a slowdown from the rates of June and May.

#### ◆ Second quarter retail sales increase

Retail sales fell 0.3% from May to June, to \$24.2 billion, but they were up 2.1% in the second quarter compared with the first quarter.

#### ◆ Foreign investors reduce holdings of Canadian bonds

Foreign investors reduced their holdings of Canadian bonds by \$3.9 billion in June, while Canadians continued their demand for international equities.

#### ◆ Alberta leads Canada's business sector in productivity

Alberta led Canada's business sector productivity performance in 1996-97, with an average gross domestic product (GDP) per job of \$66,000. This was \$10,000 higher than Ontario.

#### ◆ More giving and less volunteering

In 2000, Canadians were volunteering less but giving more money than they were in 1997. However, the rate of increase in average donations since 1997 did not keep pace with the rate of increase of average household incomes of donors.

### Inflation continues to decelerate

The prices of goods and services included in the Consumer Price Index (CPI) rose 2.6% from July 2000 to July 2001, a slowdown from the rates of 3.3% in June and 3.9% in May. A 6.1% drop in energy prices from June to July is the main reason for the deceleration.

Between April and June, energy prices accounted for about one-third of inflation. In July, they accounted for one-tenth of the rise in the all-items index, effectively narrowing the gap between the all-items CPI and the CPI excluding energy. Most of July's upward price pressure in energy prices stemmed from a 37.5% climb in natural gas prices; this was nonetheless lower than June's 62.0% rise. A 5.0% increase in electricity prices also boosted the energy index, but an 8.5% drop in the price of gasoline offset the rise.

Food prices continued to have a significant impact on the all-items CPI in July, accounting for almost one-third of the 12-month increase. Food prices grew 4.6%, matching June's rate. Higher prices for restaurant meals, beef and fresh fruit continued to play a dominant role.

Climbing food costs, especially for meat, contributed to a 3.5% rise in restaurant meal prices. Two consecutive monthly decreases in beef prices brought the 12-month increase in the beef index to

#### Consumer Price Index, July 2001

% change, previous year, not seasonally adjusted

	All items	Food	Shelter	Transportation	Energy
<b>Canada</b>	<b>2.6</b>	<b>4.6</b>	<b>4.6</b>	<b>-0.6</b>	<b>2.8</b>
Newfoundland	1.3	2.9	2.5	-2.9	-3.1
Prince Edward Island	3.3	3.2	3.0	4.0	7.8
Nova Scotia	2.3	2.1	3.5	-0.2	-0.2
New Brunswick	1.5	1.9	1.7	-2.0	-4.0
Quebec	2.3	5.1	2.3	-2.0	-4.7
Ontario	3.1	4.4	6.4	-0.8	7.5
Manitoba	3.2	4.8	5.5	0.9	10.7
Saskatchewan	3.5	3.6	8.9	0.8	12.4
Alberta	2.9	5.6	4.1	1.4	1.8
British Columbia	1.8	4.7	2.2	0.3	1.2
Whitehorse	2.1	4.7	2.3	1.1	5.8
Yellowknife	1.5	3.6	0.4	3.9	0.9

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### ... Inflation continues to decelerate

14.0%, down from a 21-year record high in May (+19.2%). While the arrival of some local produce led to a slight decline in the monthly price of fresh fruit, prices still remained 10.5% higher than in July 2000. Fresh fruit prices have been feeling the lingering effect of bad weather last winter and higher transportation costs.

Prices for cigarettes, the cost of mortgage interest, rent and prices for motor vehicles also helped boost the all-items CPI, but lower prices for computer equipment and supplies had an offsetting effect.

For the first time since January 2001, the monthly CPI lost ground, dropping 0.3% from June to July. The greatest downward price pressure came from the energy sector, reflecting weaker gasoline and natural gas prices. Partly offsetting these effects were higher prices for air transportation and traveller accommodation.

On the heels of June's 4.3% decline, gasoline prices dropped a further 9.6% in July amid local price wars and signs of ample inventories. This follows a 1.2% drop in crude oil prices in June. Natural gas prices fell 8.4% from June to July, the largest monthly decline since April 1997. The bulk of this decline stemmed from a 35.5% drop in Alberta, in reaction to lower wholesale prices.

Prices for air transportation climbed 12.3% from June to July. Domestic and Pacific routes had the largest impact on the index, reflecting high-season travel. As the summer tourist season continued, travellers faced a further 7.4% climb in their accommodation costs, the fourth consecutive monthly increase.

The July 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 or toll-free 1-866-230-2248 (infomit@statcan.ca) or contact Joanne Moreau at (613) 951-7130; fax: (613) 951-1539, Prices Division. (See also "Current trends" on page 7.)

## Second quarter retail sales increase

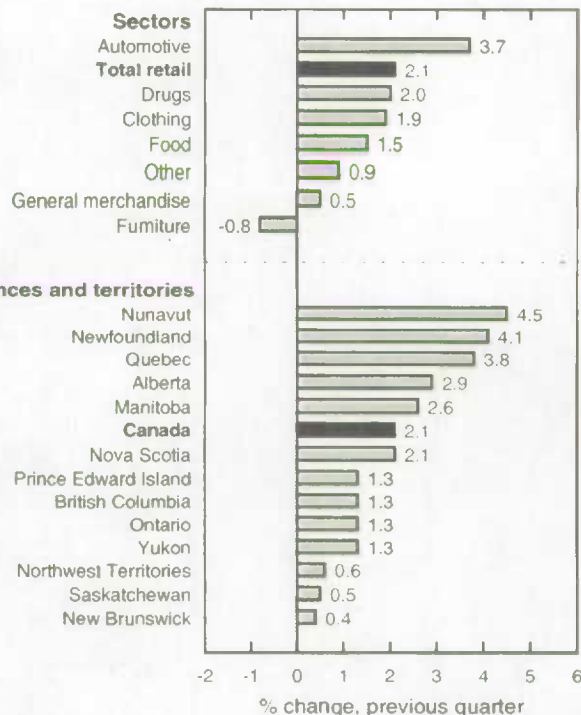
Retail sales fell 0.3% in June to \$24.2 billion, after increasing almost every month since last November. June's decline offset most of May's 0.4% rise.

Although sales were essentially unchanged in May and June, they were up 2.1% in the second quarter compared with the first quarter. This quarterly gain, driven mostly by April's 1.8% increase, was the strongest since the third quarter of 2000. Sales have been generally rising since the summer of 1998, except for a stagnant period from July to November 2000.

In June, only the furniture and general merchandise sectors posted sales increases (+1.5% and +0.9%, respectively). Clothing stores and stores classified as "other retail" posted the most significant declines. The "other retail" category includes liquor, sporting goods, hardware and book stores. Smaller declines were noted in the automotive sector, in food stores and in drug stores.

Retailers in the automotive sector enjoyed a resurgence in the second quarter. Their sales advanced 3.7% compared with the

Retail sales, second quarter 2001



Retail sales, June 2001  
Seasonally adjusted

	\$ millions	% change, previous month	% change, previous year
<b>Canada</b>	<b>24,232</b>	<b>-0.3</b>	<b>5.2</b>
Newfoundland	411	0.8	8.6
Prince Edward Island	108	1.8	5.1
Nova Scotia	729	-0.8	2.2
New Brunswick	585	0.5	1.8
Quebec	5,588	-0.3	6.3
Ontario	9,125	-0.9	2.9
Manitoba	826	-0.6	6.0
Saskatchewan	691	-1.0	1.2
Alberta	2,907	0.4	10.9
British Columbia	3,178	0.8	6.6
Yukon	30	3.5	5.6
Northwest Territories	36	-0.2	14.0
Nunavut	17	5.4	14.6

first quarter. Other categories reporting sales increases were Motor and recreational vehicle dealers (+4.0%), gasoline service stations (+3.4%) and retailers of automotive parts, accessories and services (+3.0%).

Second quarter sales in drug stores and clothing stores increased 2.0% and 1.9%, respectively. In the second quarter, consumers spent 0.5% more in general merchandise stores after a strong first quarter (+2.6%). Most of the first quarter increase reflected the opening of several new department stores at the end of November 2000. Department store sales advanced 0.8% in the second quarter, after a 4.9% jump in the first quarter. Furniture stores posted their

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### ... Second quarter retail sales increase

first quarterly sales decline (-0.8%) in five years. Furniture store sales in the first six months of 2001 were 7.1% higher than in the first half of 2000.

Led by Saskatchewan (-1.0%), Ontario (-0.9%) and Nova Scotia (-0.8%), half the provinces posted lower retail sales in June. Retailers in Prince Edward Island (+1.8%), British Columbia (+0.8%) and Newfoundland (+0.8%) reported the strongest gains. However, retail sales advanced in all provinces and territories in the second quarter, but increases varied considerably by region. Nunavut (+4.5%), Newfoundland (+4.1%) and Quebec (+3.8%) led sales advances in the second quarter. The weakest gains were seen in New Brunswick (+0.4%), Saskatchewan (+0.5%) and the Northwest Territories (+0.6%).

## Foreign investors reduce holdings of Canadian bonds

**F**oreign investors reduced their holdings of Canadian bonds in June; Canadian investors continued their demand for international equities, while at the same time selling off foreign-issued bonds.

The \$3.9 billion divestiture by foreign investors in June came as a result of record retirements of foreign-held bonds issued by the Government of Canada. Corporations in Canada, meanwhile, were less active in placing new issues in foreign markets during the month of June. Consequently, foreign holdings rose very little after a major build-up in the four previous months.

This was the first reduction of the year after investments of \$18.6 billion in the first five months of 2001. American investors accounted for two-thirds of June's reduction; European and Asian investors accounted for the remaining third.

The Canadian investment of \$2.0 billion in foreign equities in June was well below the monthly average of nearly \$5 billion over the first five months of 2001. While June's investment went entirely to overseas markets, the half-year accumulation of foreign

The automotive sector drove up total retail sales in Newfoundland and Quebec in the second quarter. All remaining retail sectors in these provinces also saw advances in the second quarter, except the Quebec furniture sector, which declined. In New Brunswick and Saskatchewan, strong sales drops in furniture stores tempered the moderate sales increases observed in the automotive sector.

The June 2001 issue of *Retail trade* (Internet: 63-005-XIB, \$16/\$155; paper: 63-005-XPB, \$21/\$206) is now available. For more information, contact Client Services (1-877-421-3067; 613-951-3549; retailinfo@statcan.ca) or Paul Gratton (613-951-3541; paul.gratton@statcan.ca), Distributive Trades Division.

### Related market information

Further marginal declines in both Canadian and U.S. short-term interest rates pushed the differential from 76 basis points in May to 83 in June. This differential, which favours investing in Canada, has steadily increased since February 2001. Small declines of long-term rates in Canada and the U.S. in June pushed the differential to 27 basis points from 17, also continuing to favour investment in Canada.

Measured by the TSE 300 Composite Index, Canadian stock prices fell 5.2% in June, after recovering somewhat slightly in April and May, for a cumulative decline of 31% of their value since their record close of August 2000. U.S. stock prices (Standard and Poor's 500 index) declined 2.5% in June, and have fallen 19% from their record closing in August 2000.

The Canadian dollar recorded a second sharp gain in June 2001, posting a U.S. 1-cent rise against the American dollar. With June's closing of 66.05 cents, the Canadian dollar recovered 80% of what it lost in February and March.

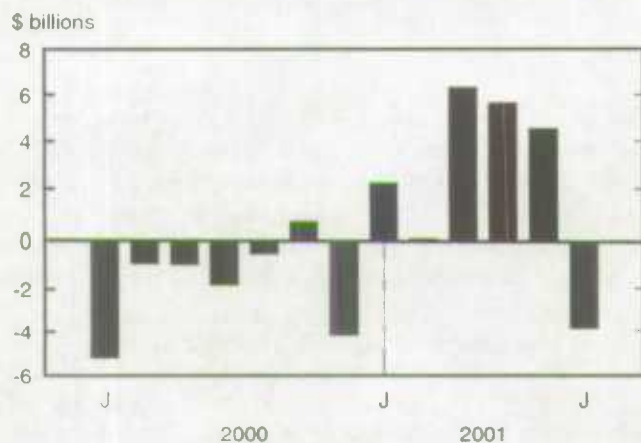
equities (\$26.3 billion) was evenly split between U.S. and overseas shares. Canadians sold off \$0.8 billion of foreign bonds in June, an amount similar to the amount purchased by Canadians in May. This activity continued to be focussed on U.S. treasuries.

After increasing their holdings of money market paper by \$1.3 billion over April and May, foreigners reduced their holdings by \$1.6 billion in June. During the first six months of 2001, foreigners divested \$5.2 billion in holdings. June's reduction was split between federal treasury bills and other money market paper, a pattern that has prevailed for most of the first half of 2001.

Foreign investors added \$4.7 billion to their holdings of Canadian stocks in June. This was heavily influenced by the issuance of new treasury shares by a Canadian firm that acquired a foreign company. Otherwise, U.S. investors acquired a small amount of Canadian shares in the secondary market for a second consecutive month.

The June 2001 issue of *Canada's international transactions in securities* (Internet: 67-002-XIB, \$14/\$132; paper: 67-002-XPB, \$18/\$176) will be available in September. For more information, contact Donald Granger (613-951-1864; grandon@statcan.ca), Balance of Payments and Financial Flows Division.

### Foreign investment in Canadian bonds



## Alberta leads Canada's business sector in productivity

Alberta led Canada's business sector productivity performance in 1996-97, with an average gross domestic product (GDP) per job of \$66,000. This was \$10,000 higher than Ontario, which ranked second, followed by Saskatchewan, Quebec and British Columbia.

Conversely, Manitoba (\$44,000) and Atlantic Canada (\$42,000) had the lowest GDP per job; their average productivity was only two-thirds that of Alberta. Labour productivity differences reflect not only variations in the efficiency of labour but also dissimilarities in the availability of capital per job—a result of capital accumulation.

Provincial GDP per job differs substantially across industries. In the Atlantic provinces, the high-wage services sector is the most productive, followed closely by the natural resources sector. In Quebec, the high-wage services sector is ranked second, right after the secondary manufacturing sector. From Ontario going west, the natural resources sector is the most productive, followed generally by the high-wage services sector.

While sectoral productivity performance varies significantly across provinces, Alberta occupies a pre-eminent position in the most innovative sectors, such as high-wage services and manufacturing. Alberta and Ontario lead the high-wage services sector with a value of GDP per job close to \$100,000, compared with \$87,000 in Quebec, which ranks second. Alberta is also the most productive in the core manufacturing sector (\$113,000), followed by Quebec and Ontario (about \$80,000).

### Productivity by province

	Productivity (\$'000 GDP per job)	Productivity difference from Ontario (%)
Alberta	66.2	17.6
Ontario	56.3	...
Saskatchewan	54.1	-3.9
Quebec	51.8	-8.0
British Columbia	51.3	-8.9
Manitoba	44.1	-21.7
Atlantic region	41.7	-25.9

... Figures not appropriate or not applicable.

## More giving and less volunteering

In 2000, Canadians were volunteering less but giving more money than they were in 1997. However, average donations increased 8%—half the rate of increase in average household incomes of donors (+16%).

Between October 1999 and September 2000, 91% of the population aged 15 and older made donations, either money or in-kind, to charitable and non-profit organizations. This level was about the same as in 1997, but the financial support provided by these people is estimated at more than \$5 billion, an 11% increase from 1997. After correcting for inflation, the increase, in real terms, was about 6%. The lion's share, about \$4.9 billion, came from the 78% of people who made direct financial donations, either in response to a request from an organization, or by approaching it on their own initiative.

### Note to readers

Many factors account for the differences in productivity across provinces, the most important being the **industrial composition** of production activity across the country. **Labour productivity** is defined as gross domestic product in current prices per job. Labour productivity differences reflect a range of factors—from differences in capital intensity to differences in efficiency.

Nine sectors were considered in the study, including **core manufacturing** (electronic products, machinery, pharmaceuticals, chemical products and refined petroleum); **secondary manufacturing** (primary metals, transportation, rubber, plastic, fabricated metals, and non-metallic minerals); **other manufacturing** (tobacco, paper, beverages, textiles, printing, wood, other textiles, furniture, clothing, and leather); and the **high-wage service sectors** (wholesale, storage, utilities, finance and pipelines).

The study makes use of a new database on provincial productivity based on 243 industries of the Canadian business sector for 1996 and 1997 averaged. The Atlantic provinces were treated as a group for the sake of confidentiality protection.

With \$360,000 of GDP per job, Saskatchewan is the most productive in the natural resources sector followed by Alberta, producing \$290,000. Much of this performance is, however, the result of the high capital intensity of this sector.

Productivity differences in the entire business sector between provinces reflect both differences in industrial composition and differences in productive efficiency across sectors. Alberta was the only province that had both a favourable industry mix and higher productive efficiency than Ontario. Saskatchewan's slightly higher productive efficiency, compared with Ontario, was more than offset by an unfavourable mix. Atlantic Canada and Manitoba had a large productive efficiency gap with Ontario.

For more information, consult the August 2001 issue of the *Canadian Economic Observer* (paper: 11-010-XPB, \$23/\$227) or contact John R. Baldwin at (613) 951-8588 (baldjoh@statcan.ca) or Tarek M. Harchaoui at (613) 951-9856; fax: (613) 951-5403 (harchar@statcan.ca). Micro-Economic Analysis Division.

While Canadians are generally generous, those who give more of their time and money represent a relatively small group of donors. In fact, 82% of total donations came from a small group (25% of total donors) that gave \$213 or more during the year. Fewer than one in ten Canadians contributed 46% of the total dollar value of all donations, as well as 40% of all volunteer hours.

About 6.5 million people, or 27% of the population aged 15 and older, gave their time in 2000. This represented a decline from the 7.5 million (31% of the population) who volunteered in 1997. With this decline, however, came an increase in the intensity of volunteering among those who gave their time. On average, each individual volunteer in 2000 contributed 162 hours during the year, up from 149 hours three years earlier. Since 1997, there

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### ... More giving and less volunteering

has been a 13% decline in the number of volunteers, despite an almost 2.5% increase in the population aged 15 and over. This appears to be a new trend in the nature of volunteering in Canadian society.

The likelihood of volunteering seems to be associated with the level of income. Only 17% of people with incomes less than \$20,000 volunteered, compared with 39% of those with incomes of \$100,000 or more. However, volunteers with the lowest levels of income gave the most time.

The increase in the total dollar value of donations between 1997 and 2000 appears to be the result of larger donations on the part of donors and of growth in the population. In 2000, individuals gave on average \$259, an increase of \$20 from 1997. Even though the total number of donors has increased since 1997, the total number of individual donations declined. Donors reported an average of 3.7 donations in 2000, down slightly from 4.0 in 1997.

Individuals with a university degree continued to give the most, an average of \$480 in 2000. However, while 90% of these individuals donated in 1997, the rate dropped to 84% in 2000.

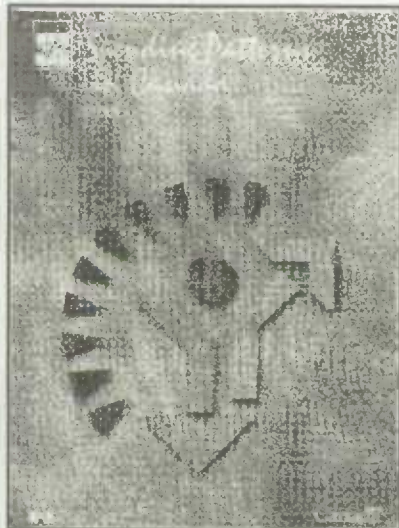
Among the youngest group (aged 15 to 24), the average annual donation increased from \$79 to \$118; among those aged 25 to 34, it went from \$159 to \$229. Among seniors aged 65 and over, the average annual donation declined from \$328 to \$308.

Religious organizations continued to receive the highest percentage of total donations: 49% of the total in 2000. The proportion of individuals who made donations to religious organizations declined from 35% in 1997 to 32% last year.

Provincially, people in Alberta and the three Atlantic provinces (Newfoundland, Prince Edward Island and Nova Scotia) had the highest rates of financial donations in 2000. All were well above the national rate of 78%. British Columbia and Quebec had the lowest rates, at 74%. As for volunteering, participation was highest in the Prairie provinces and Prince Edward Island, and lowest in Quebec and British Columbia.

*For more information, consult the report **Caring Canadians, involved Canadians: Highlights from the 2000 National Survey of Giving, Volunteering and Participating** (Internet: 71-542-XIE, free; paper: 71-542-XPE, \$15), or contact Karen Roberts (613-951-3726), Special Surveys Division.*

## New from Statistics Canada



### Spending patterns in Canada 1999

*Spending patterns in Canada* presents analysis and key tables from the annual Survey of Household Spending. Find out how Canadian households spend their money—what appliances, communications or home entertainment equipment they have, for example. The survey collects information about expenditures by households and families on a wide variety of goods and services, from food and shelter to pet expenses and movie admissions.

*Spending patterns in Canada, 1999* (Internet: 62-202-XIE, \$34; paper: 62-202-XPE, \$45) is now available. For more information, contact Client Services (1-888-297-7355; 613-951-7355; fax: 613-951-3012; [income@statcan.ca](mailto:income@statcan.ca)), Income Statistics Division.

### Perspectives on labour and income August 2001 online edition

The August 2001 issue of *Perspectives on labour and income* offers a historical perspective on the number of workdays lost to strikes and lockouts in Canada. The time-loss ratio (workdays lost per 1,000 employees) is used to compare trends over the last two decades. Also in this issue is a fact sheet on unionization, an annual update of the most recent trends related to union membership and coverage.

The August 2001 online edition of *Perspectives on labour and income*, Vol. 2, no. 8 (Internet: 75-001-XIE, \$5/\$48) is now available. For more information, contact Henry Pold, (613-951-4608; [henry.pold@statcan.ca](mailto:henry.pold@statcan.ca)), Labour and Household Surveys Analysis Division.

### Canadian economic observer August 2001

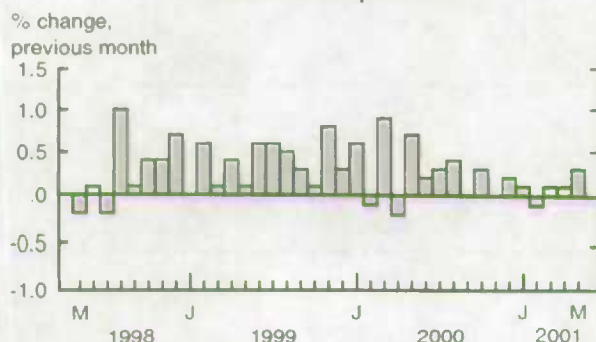
The August issue of *Canadian economic observer* analyzes current economic conditions, summarizes the major economic events that occurred in July and presents a feature article on inter-provincial productivity differences. A separate statistical summary contains a wide range of tables and graphs on the principal economic indicators for Canada, the provinces and the major industrial nations.

The August 2001 issue of *Canadian economic observer* (paper: 11-010-XPB, \$23/\$227) is now available. For more information, contact Philip Cross (613-951-9162; [ceo@statcan.ca](mailto:ceo@statcan.ca)), Current Economic Analysis Group.



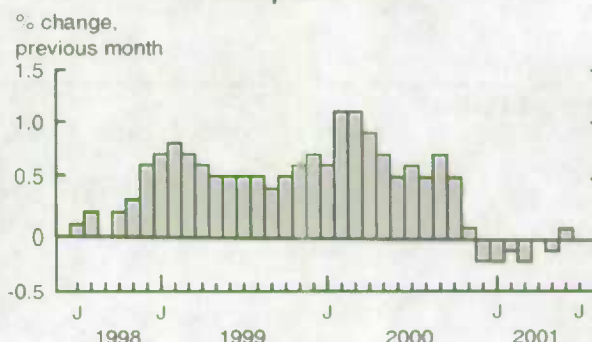
## Current trends

### Gross domestic product



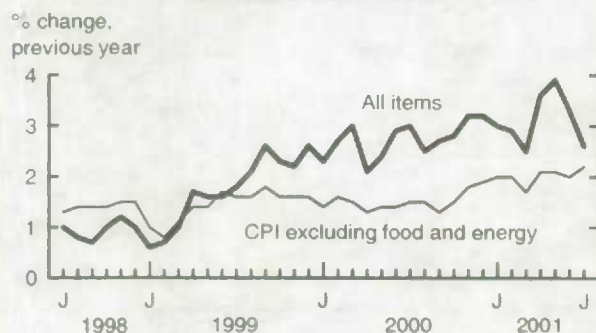
Total economic activity advanced 0.3% in May, the strongest showing in seven months.

### Composite Index



The leading indicator was unchanged (0.0%) in July, pulled down by a moderation in housing.

### Consumer Price Index



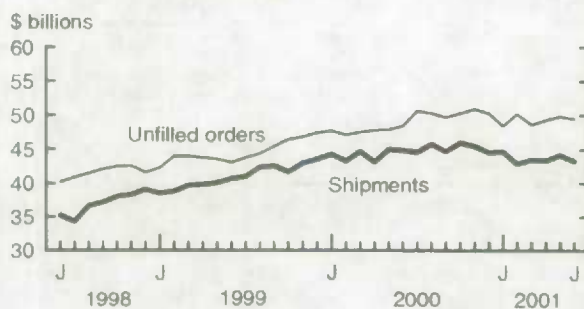
Consumer prices for goods and services were 2.6% higher in July than they were a year earlier. Excluding food and energy, prices rose 2.2%.

### Unemployment rate



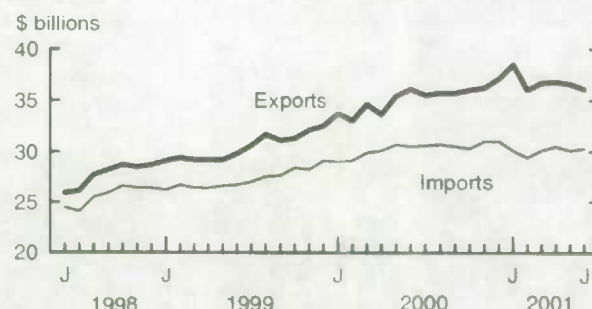
In July, the unemployment rate held at 7.0% for the fifth consecutive month.

### Manufacturing



Manufacturers' shipments declined 1.9% in June to \$43.3 billion. The backlog of unfilled orders posted a 0.6% decrease to \$49.5 billion.

### Merchandise trade



In June, the value of merchandise exports declined 1.4% to \$36.1 billion. Imports increased 0.8% to \$30.3 billion.

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

## Latest statistics

	Period	Level	Change, previous period	Change, previous year
<b>GENERAL</b>				
Gross domestic product (\$ billions, 1992)	May	798.8	0.3%	1.7%
Composite Index (1992=100)	July	166.2	0.0%	1.1%
Operating profits of enterprises (\$ billions)	Q2 2001*	44.7	0.6%	-11.3%
Capacity utilization rate (%)	Q1 2001	84.1	-1.0†	1.5†
<b>DOMESTIC DEMAND</b>				
Retail trade (\$ billions)	June	24.2	-0.3%	5.2%
Department store sales (\$ billions)	June	1.65	0.6%	7.6%
New motor vehicle sales (thousands of units)	June	133.8	1.5%	0.0%
Wholesale trade (\$ billions)	June	32.9	0.2%	2.8%
<b>LABOUR</b>				
Employment (millions)	July	15.08	-0.1%	1.4%
Unemployment rate (%)	July	7.0	0.0†	0.2†
Participation rate (%)	July	65.8	-0.2†	0.1†
Average weekly earnings (\$)	June*	661.38	0.2%	1.3%
Help-wanted Index (1996=100)	July	155	-3.7%	-10.9%
<b>INTERNATIONAL TRADE</b>				
Merchandise exports (\$ billions)	June	36.1	-1.4%	-0.1%
Merchandise imports (\$ billions)	June	30.3	0.8%	-0.6%
Merchandise trade balance (all figures in \$ billions)	June	5.8	-0.7	0.2
<b>MANUFACTURING</b>				
Shipments (\$ billions)	June	43.3	-1.9%	-3.4%
New orders (\$ billions)	June	43.1	-3.7%	-5.1%
Unfilled orders (\$ billions)	June	49.5	-0.6%	2.3%
Inventory/shipments ratio	June	1.51	0.03	0.13
<b>PRICES</b>				
Consumer Price Index (1992=100)	July	117.1	-0.3%	2.6%
Industrial Product Price Index (1992=100)	July*	128.9	-0.6%	0.9%
Raw Materials Price Index (1992=100)	July*	138.9	-1.7%	-2.0%
New Housing Price Index (1992=100)	June	106.0	0.3%	2.9%

*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 August 22 to 28, 2001

SUBJECT AREA Title of product	Period	Catalogue number	Price (\$) (issue/subscription)
<b>AGRICULTURE</b>			
Farm cash receipts	January to June 2001	21-001-XIB	15/48
Farm product price index	June 2001	21-007-XIB	free
Field crop reporting series: Estimate of production of principal field crops, Vol. 80, no. 5	July 31, 2001	22-002-XIB	11/66
Field crop reporting series: Estimate of production of principal field crops, Vol. 80, no. 5	July 31, 2001	22-002-XPB	15/88
The dairy review, Vol. 62, no. 2	Q2 2001	23-001-XIB	27/89
The dairy review, Vol. 62, no. 2	Q2 2001	23-001-XPB	36/119
<b>BALANCE OF PAYMENTS AND FINANCIAL FLOWS</b>			
Foreign direct investment: A driving force in economic globalization		67F0001MIB01020	free
<b>CURRENT ECONOMIC ANALYSIS</b>			
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Quarterly report on energy supply-demand in Canada	Q3 2000	57-003-XPB	43/141
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Friday

## Calendar of key releases: September

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