



Infomat

A Weekly Review

Friday, October 25, 2002

INSIDE

◆ Second straight increase in manufacturers' shipments

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◆ Wholesale trade boosted by strong motor vehicle sales

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◆ Job stability on the rise throughout 1990s

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◆ Canadians eating more fruit, vegetables than a decade ago

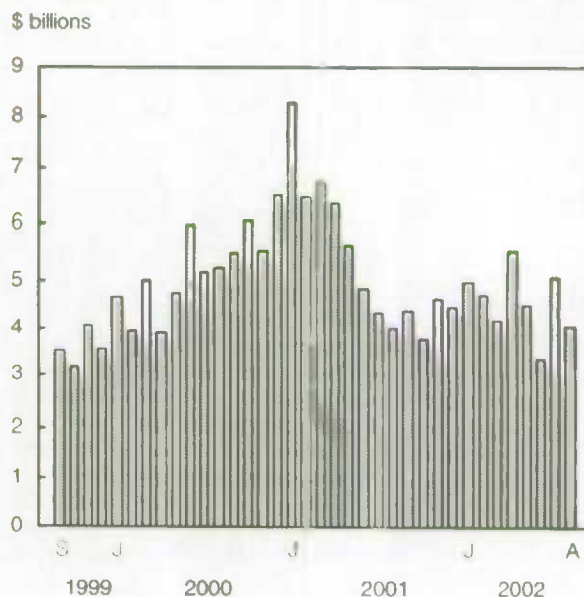
In 2001, Canadians ate an average of 125 kilograms of fruit, slightly less than in 2000, but up more than 13% from the early 1990s. Also, consumption of vegetables increased 9% from a decade ago.

Trade surplus slides with surge in imports

Exports declined 0.6% in August to \$34.8 billion, but imports rose 2.6% to \$30.7 billion, the highest level of 2002. This resulted in a slide of nearly \$1 billion in Canada's merchandise trade surplus with the world to \$4.1 billion.

Canadian companies sent \$29.8 billion in goods to the United States in August, accounting for nearly 86% of total exports. Imports from south of the border increased 2.8% to \$22.1 billion. The trade surplus with the United States fell to \$7.7 billion, a drop of \$501 million.

Canada's trade deficit with countries other than the United States widened from \$3.1 billion in July to \$3.6 billion in August, the result of stronger import activity from all of Canada's principal trading partners.

*(continued on page 2)***Trade balance**

Trade surplus slides... (continued from page 1)

Domestic plants exported \$8.8 billion worth of automotive products in August, the highest level of 2002. Exports of trucks to the United States were up significantly because of the announcement of the new emission standard law to take effect October 1. With US companies buying before the deadline, trucks and other motor vehicle exports jumped 44.7% to \$1.6 billion, the largest monthly output in 2002. Exports of motor vehicle parts used in assembly plants increased slightly, but car exports declined.

The forestry products sector continued to regain ground following the 40% drop in lumber exports that resulted from anti-dumping and countervailing duties imposed in May on the softwood lumber industry. Since then, exports of forestry products have risen 7.0% from June to August to nearly \$3 billion.

In the machinery and equipment sector, exports fell 2.2% to \$7.7 billion. With international demand for corporate aircraft down, especially in the European Union, aircraft, engines and parts exports declined 5.9% to \$1.3 billion in August.

Exports of all energy fell 1.9% to \$4.1 billion. Crude petroleum rose 1.7% to \$1.5 billion, as increased volumes more than offset a slight decline in price.

Industrial goods and materials, the third largest export sector, which consists mainly of primary metals and ores, fell 2.2% to \$5.9 billion.

With the establishment of a new automobile dealer network in Canada, imports of passenger autos increased 13.6% to \$2.2 billion, as dealerships stocked up on the vehicles that would be introduced to consumers during late summer. Motor vehicle parts imports fell 4.0% to \$3.8 billion, largely the result of stronger-than-seasonal auto manufacturing activity in July, which kept plants humming through shorter-than-usual summer shut-down periods.

Imports of agricultural and fishing products decreased slightly to \$1.9 billion. Agricultural products used to feed cattle, such as shelled corn, fodder and feed, and crude vegetable products saw price increases ranging from 3% to 6% over July, with volumes trending upward as domestic inventories of cattle feed fell to critical levels on drought-stricken farms in western Canada.

Imports of machinery and equipment, Canada's largest import sector, increased 2.6% to nearly \$9 billion.

Larger-than-seasonal import volumes of energy products drove a 14.2% increase to \$1.5 billion. The risk of conflict in the Middle East pushed prices of crude petroleum and petroleum and coal products up more than 4% in August.

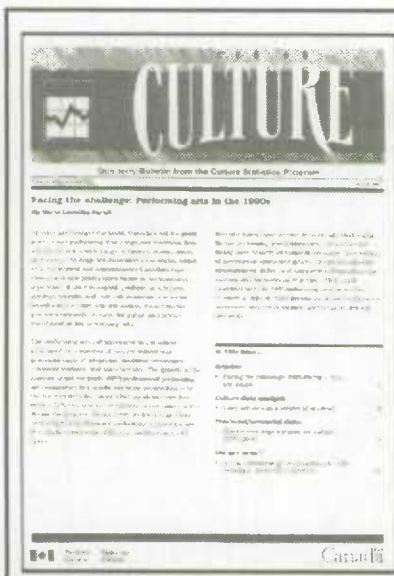
Canadian international merchandise trade (Internet: 65-001-XIB, \$14/\$141; paper: 65-001-XPB, \$19/\$188) is now available. For more information, contact Daryl Keen (613-951-1810), International Trade Division. (See also "Current trends" on page 6.)

Focus on culture

This issue of *Focus on culture* features the article "Facing the challenge: Performing arts in the 1990s," which examines trends in audiences, income sources, program delivery and expenses for Canada's non-profit theatre, music, dance and opera companies. This article suggests that although companies have been able to curtail costs and increase private sector funding, the decline in attendance is a challenge that continues to plague the performing arts.

This issue also contains new reconciled tables for the performing arts from 1991/92 to 1998/99, and data for government expenditures on culture from 1995 to 1999.

Focus on culture, Vol. 14, no. 1 (Internet: 87-004-XIE, \$7/\$20; paper: 87-004-XPB, \$9/\$27) is now available. For more information, contact Client Services (1-800-307-3382; cult.tourstats@statcan.ca) or Mary Cromie (613-951-6864; mary.cromie@statcan.ca) Culture, Tourism and the Centre for Education Statistics.



Canadian business patterns

In June, Canada had 2,173,598 active business establishments. Data from the June 2002 version of Canadian business patterns are now available on CD-ROM. The data are presented by the 1996 Standard Geographical Classification, by both the 1980 Standard Industrial Classification and the North American Industry Classification System as well as by employment categories.

Canadian business patterns (CD-ROM: 61F0040XCB) is now available. The cost varies from \$150 to \$2,000 depending on the complexity of the data request. For more information, contact Collette Lachance (613-951-0389) or Beau Cinnamon (613-951-9021), Business Register Division.

Second straight increase in manufacturers' shipments

Although manufacturers maintained their pace in August, boosting shipments 0.6% to \$43.9 billion, the increase was largely the result of higher prices for petroleum and coal products. August's increase came after a 1.0 % advance in July.

The rise in shipments for August was concentrated in non-durable goods industries. Shipments climbed 1.5% in this sector, and have been on an upward swing for the last six months. Higher manufacturing output was reflected in 12 of 21 manufacturing industries, representing 55% of total shipments. A 3.0% drop in the output of motor vehicles offset some of the gain this month.

In August, manufacturers added 21,000 jobs to their payrolls, but, according to the most recent Labour Force Survey, the majority of the gains in August were lost as employment fell by 17,000 in September. However, the sector remains a major source of strength, with gains totalling 132,000 since the beginning of 2002.

Although year-to-date shipments remained 0.4% below the same period of 2001, manufacturing activity has improved significantly in 2002. Manufacturing in the United States, however, has not fared as well. As economic uncertainty continued to prevail in the United States, year-to-date shipments at the end of August were down 2.7% from the same period of 2001.

US inventories fell only marginally in August, but this marked the nineteenth consecutive decline in manufacturing stocks. In Canada, improved manufacturing activity in recent months coincided with an upswing in inventories. Inventories rose 0.8% to \$62.6 billion in August, the third straight increase.

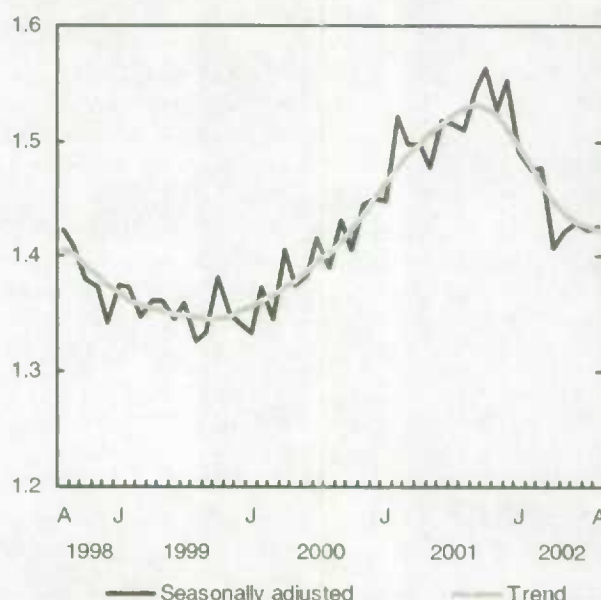
Shipments of petroleum and coal products climbed to the highest level in 15 months, rising 5.2% to \$2.9 billion in August following a 6.4% gain in July. Higher industrial prices for petroleum products, the result of heightened market uncertainty in the Middle East, contributed to this month's increase.

Manufacturers' shipments, August 2002

Seasonally adjusted

| | \$ millions | % change, previous month |
|---|---------------|-----------------------------|
| Canada | 43,900 | 0.6 |
| Newfoundland and Labrador | 182 | -1.9 |
| Prince Edward Island | 110 | 3.7 |
| Nova Scotia | 749 | 3.7 |
| New Brunswick | 1,129 | 4.7 |
| Quebec | 10,135 | -0.4 |
| Ontario | 23,666 | 0.4 |
| Manitoba | 973 | 0.5 |
| Saskatchewan | 594 | 2.0 |
| Alberta | 3,455 | 2.1 |
| British Columbia | 2,909 | 1.4 |
| Yukon, Northwest Territories and Nunavut | 5 | -12.5 |

Inventory-to-shipment ratio



Wood products shipments rose for the second month in a row, up 5.5% to \$2.5 billion in August. This followed a period of sharp cutbacks in May and June, which coincided with May's reinstatement of duties imposed by the United States on Canadian exports of softwood lumber.

The investment boom in domestic new housing may have offset some of the loss of foreign demand, before the heightened US duties. Prices for lumber, sawmill and other wood products edged up 0.1% after a 0.5% rise in July.

Partly offsetting August's higher shipments were decreases in the motor vehicle and the computer and electronic products industries.

Inventory levels increased for the third consecutive month. Aerospace product and parts manufacturers led all industries with a 2.7% climb in inventories in August. Weakness in the international aerospace sector continued to impede manufacturers of aircraft and parts.

Led by a healthy rise in inventories relative to shipments, the inventory-to-shipment ratio edged up to 1.43 in August from 1.42 in July. The ratio has hovered around this level in recent months, as shipments rebounded and inventories stabilized, following the economic slowdown of 2001.

Rising 0.8% to \$46.8 billion in August, unfilled orders partly recovered from a 1.4% decline in July. New orders rose 3.0% in August to \$44.3 billion, driven by a boost in the transportation equipment sector.

The August 2002 issue of the *Monthly Survey of Manufacturing* (Internet: 31-001-XIB, \$15/\$147) will be available soon. For more information, contact Russell Kowaluk (613-951-0600; kowaluk@statcan.ca), Manufacturing, Construction and Energy Division. (See also "Current trends" on page 6.)

Wholesale trade boosted by strong motor vehicle sales

Wholesale sales rose 1.1% in August, buoyed by strong sales of motor vehicles, parts and accessories and increased demand for industrial machinery. Wholesalers sold \$35.1 billion worth of goods and services in August.

Eight of the 11 sectors recorded an increase in August. The sectors that contributed the most to the increase in terms of value were the automotive sector, industrial machinery and food products. The increases in these sectors were partly offset by steep declines in the computer sector and the farm machinery sector.

Robust employment growth since the start of 2002 and low interest rates continued to boost wholesale sales of durable goods. Wholesale sales of motor vehicles, parts and accessories rose strongly in August (+3.4%).

Wholesale trade, August 2002 Seasonally adjusted

| | \$ millions | % change, previous month | % change, previous year |
|---------------------------|---------------|--------------------------------|-------------------------------|
| Canada | 35,141 | 1.1 | 5.6 |
| Newfoundland and Labrador | 228 | -1.5 | 6.9 |
| Prince Edward Island | 55 | 0.4 | 3.7 |
| Nova Scotia | 601 | -2.7 | -1.6 |
| New Brunswick | 435 | 0.1 | -1.0 |
| Quebec | 7,039 | -1.2 | 5.4 |
| Ontario | 17,769 | 2.0 | 6.9 |
| Manitoba | 991 | -5.2 | 1.6 |
| Saskatchewan | 1,046 | 5.3 | 4.0 |
| Alberta | 3,527 | 1.4 | 0.1 |
| British Columbia | 3,403 | 2.8 | 9.1 |
| Yukon | 9 | -3.2 | -9.1 |
| Northwest Territories | 36 | 43.9 | 51.8 |
| Nunavut | 2 | -11.3 | 39.5 |

Wholesale sales of household goods also advanced. The strong performance of the housing sector continued to contribute to this increase. Compared with August 2001, this trade group was up 20.3%.

Industrial machinery wholesalers saw their sales rise 2.1% in August. Despite this increase, the sector was still down 4.2% from August 2001. Sales of industrial machinery have been weak since the start of 2001. Despite the strong performance of the economy since the start of 2002, industrial machinery wholesalers are still finding it hard to boost their sales.

Wholesale sales of computers, packaged software and other electronic equipment declined 4.0% in August. Sales in this sector have shown some weakness in the last few months after rising from October 2001 to April 2002.

In August, six provinces contributed to the increase in wholesale sales. The largest gains were reported in Saskatchewan (+5.3%), British Columbia (+2.8%) and Ontario (+2.0%).

Healthy sales in the other products category, especially chemical products and other agricultural supplies, largely explained the growth in Saskatchewan.

In British Columbia, increases were seen in the food products sector, the computer, packaged software and other electronic equipment sector, and the lumber and building materials sector.

Ontario wholesalers continued to benefit from the strong performance of its automotive sector, accounting for three-quarters of this sector's sales in Canada.

The notable robust sales registered in the Northwest Territories were largely because of increased investment in industrial machinery as a result of mineral prospecting and mine development.

The inventory-to-sales ratio fell from 1.27 in July to 1.26 in August. Despite the rise in wholesale inventories in the last five months (+0.3% in August), the ratio continues to be well below the average of 1.33 in 2001.

The August 2002 issue of Wholesale trade (Internet: 63-008-X1B, \$14/\$140) is now available. For more information, contact Jean Lebreux (613-951-4907; jean.lebreux@statcan.ca), Distributive Trades Division.

Aquaculture statistics

Canada's aquaculture industry reported total operating revenues of \$704.5 million in 2001, down from \$722.9 million in 2000. Sales of products and services totalled \$675.2 million, down 2.5%. Sales of finfish, mostly salmon, accounted for \$602.0 million, or almost 90%, of total sales.

British Columbia remained the largest aquaculture-producing province, with sales of \$293.4 million. Farmers there accounted for 43% of the country's total aquaculture sales. An increase in finfish production was offset by falling prices of farmed salmon. As a result, total sales of finfish in 2001 fell 2.8%; sales of molluscs totalled \$18 million, up 38% from 2000.

New Brunswick sales, which reached \$279.1 million in 2001, also fell as a result of lower prices. British Columbia and New Brunswick accounted for 84% of aquaculture revenues in 2001.

Aquaculture Statistics (23-222-X1E, free) will be available soon on Statistics Canada's website (www.statcan.ca). For more information, contact Debbie Dupuis (613-951-2553; debbie.dupuis@statcan.ca) or Bernadette Alain (902-893-7251; bernadette.alain@statcan.ca), Agriculture Division.

Job stability on the rise throughout 1990s

Job stability increased steadily during the 1990s, more than offsetting declines in the 1980s, according to a new study. In 2001, 80% of employees remained with the same employer at least one more year, compared with 76% in 1980 and 74% in 1989.

In the 1980s, job stability was higher among men than women, but the gap between them had all but closed by 2001. In 1980, about 78% of men held their jobs for at least one more year, compared with 74% of women. By 2001, the proportion for men increased slightly to 80%, and the proportion for women rose substantially to 79%.

Men and women with a university degree had greater job stability than their counterparts with a high school education or less.

Job stability also rises with age, with workers aged 40 to 54 enjoying the most stability. In 2001, 89% of men in this age group held on to their jobs for at least one more year, compared with only 81% of men aged 25 to 39 and only 57% of those aged 15 to 24.

Similarly, 88% of women aged 40 to 54 kept their jobs for at least one more year, compared with 80% of those aged 25 to 39

and only 56% of those aged 15 to 24. Job stability declines after age 54, reflecting the influence of retirement.

Job stability held steady during these two decades for male workers aged 25 to 39 and 40 to 54. However, it did increase somewhat for women in both age groups. For example, the proportion of women aged 40 to 54 who held a job for at least one year increased from 85% in 1980 to 88% in 2001.

In 2001, 55% of workers who had been in a job for less than one year were still with the same employer one year later. This proportion jumped to 74% among workers who had been in a job that lasted from one to two years. For workers who had been in a job that lasted nine to 15 years, 96% were still with the same employer one year later.

From the mid-1980s to the early 1990s, job stability rose 2.2% in Canada but declined 1.8% in the United States. A rise in stability of jobs with less than two years of tenure was observed in both countries. However, the United States saw a decline in the stability of jobs with two to 15 years of tenure.

*The research paper **Evolution of job stability in Canada: Trends and comparisons to US results**, no. 162 (11F0019MIE, free) is now available on Statistics Canada's website (www.statcan.ca). For more information, contact Andrew Heisz (613-951-3748; heiszand@statcan.ca) or Sébastien LaRochelle-Côté (613-951-0803; sebastien.larochelle-cote@statcan.ca), Business and Labour Market Analysis Division.*

Canadians eating more fruit, vegetables than a decade ago

In 2001, each Canadian ate 125 kilograms of fruit, slightly less than in 2000, but up more than 13% from the early 1990s. Orange juice, bananas, apple juice, apples, oranges and melons topped the list, representing 62% of all fruit consumed in 2001.

Each individual ate 183 kilograms of vegetables in 2001, up 9% from a decade ago. Consumption of fresh vegetables, excluding potatoes, increased from 67 kilograms per person in 2000 to just over 69 kilograms in 2001. Tomatoes, lettuce, carrots and corn, in fresh and processed form, have remained popular choices.

Potatoes represented over 40% of all vegetables consumed. Last year, each person ate on average 75 kilograms of potatoes, in fresh form or as processed products such as french fries, potato chips, stuffed baked potatoes or frozen mashed potatoes. That compares with an average intake of 67 kilograms a decade ago.

Per capita consumption of oils and fats, which has exceeded 30 kilograms for the past five years, edged up slightly in 2001. The growing use of salad and shortening oils by households or food service outlets in salad dressings, deep fried products and other commercially prepared foods has, in large part, fuelled this increase.

Fish consumption, at almost 10 kilograms per person in 2001, increased slightly from 2000. The growing availability of convenient and easy to prepare products and demand for alternate protein sources have influenced consumption patterns.

The level of food energy available per person, which remained relatively stable throughout the 1970s and 1980s, rose 14% from 1991 to 2001. The proportion of calories available from carbohydrates has remained constant at about 50%. The share of calories from fat, up from 36% at the beginning of the 1990s, has levelled off at 38% in recent years. Protein has consistently accounted for about 12% of calories.

The amount of fat available per person from the food supply has increased 18% from 1991 to 2001. The main contributor to total fats was the oils and fats category, followed by the combined group of red meat, poultry and fish. In 2001, the contribution of oils and fats to total fat available stood at 55%, compared with 48% a decade ago.

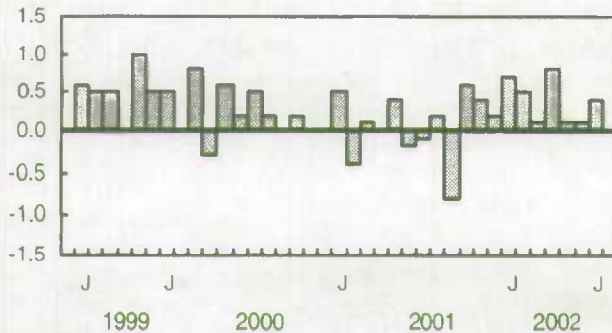
The levels of many vitamins and minerals available from the food supply have increased during the last decade. The growing consumption of fruits and vegetables has resulted in larger contributions of vitamins C and K to the food supply. The contributions of vitamins E and K have expanded in response to mounting oils and fats consumption.

For more information, contact Debbie Dupuis (1-800-465-1991; 613-951-2553; debbie.dupuis@statcan.ca) or Sandra Falcone (613-951-8726; sandra.falcone@statcan.ca), Agriculture Division.

Current trends

Gross domestic product

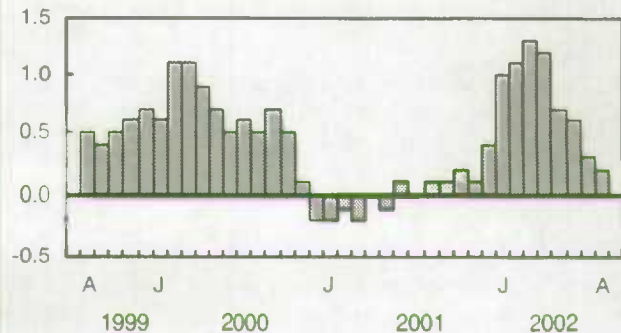
% change, previous month



Total economic activity rose 0.4% in July, following a 0.1% increase in June.

Composite Index

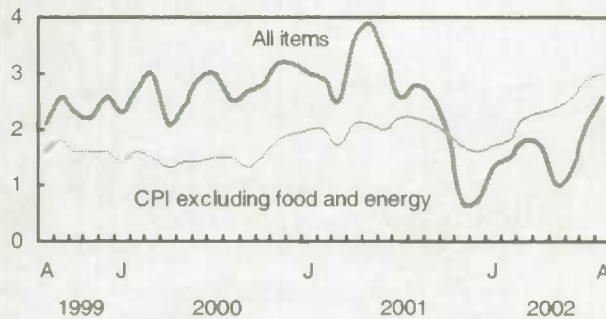
% change, previous month



The leading indicator gained 0.2% in August. Manufacturing continued to account for most of the components that rose.

Consumer Price Index

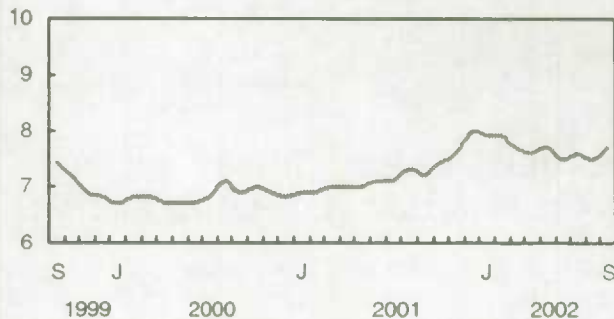
% change, previous year



Consumer prices for goods and services were 2.6% higher in August than they were a year earlier. Excluding food and energy, prices rose 3.0%.

Unemployment rate

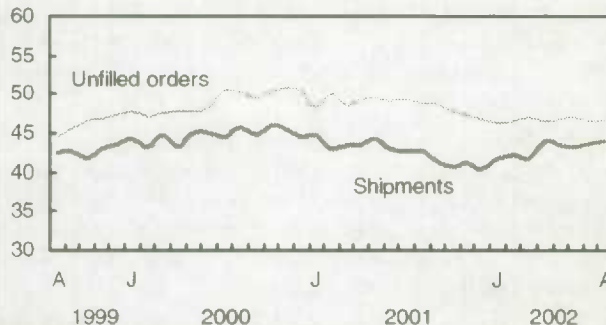
%



In September, the unemployment rate rose 0.2 percentage points to 7.7%.

Manufacturing

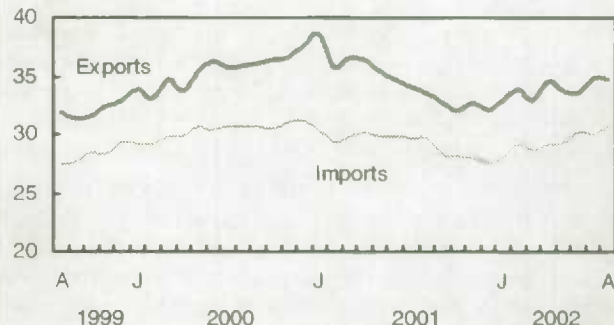
\$ billions



Manufacturers' shipments rose 0.6% in August to \$43.9 billion. The backlog of unfilled orders gained 0.8% to \$46.8 billion.

Merchandise trade

\$ billions



In August, the value of merchandise exports fell 0.6% to \$34.8 billion. Imports rose 2.6% to \$30.7 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, 1997) ¹ | July | 977.9 | 0.4% | 3.4% |
| Composite Index (1992=100) | September* | 179.1 | 0.2% | 7.6% |
| Operating profits of enterprises (\$ billions) | Q2 2002 | 38.8 | 10.7% | -0.2% |
| Capacity utilization rate (%) ² | Q2 2002 | 83.2 | 1.3† | -0.1† |
| DOMESTIC DEMAND | | | | |
| Retail trade (\$ billions) | August* | 25.7 | 0.2% | 6.4% |
| New motor vehicle sales (thousands of units) | August | 145.7 | 4.1% | 8.8% |
| Wholesale trade (\$ billions) | August* | 35.1 | 1.1% | 5.6% |
| LABOUR | | | | |
| Employment (millions) | September | 15.5 | 0.3% | 2.9% |
| Unemployment rate (%) | September | 7.7 | 0.2† | 0.5† |
| Participation rate (%) | September | 67.2 | 0.2† | 1.4† |
| Average weekly earnings (\$) | July | 677.97 | 0.3% | 1.8% |
| Help-wanted Index (1996=100) | September | 124.2 | -2.1% | -10.4% |
| Regular Employment Insurance beneficiaries (in thousands) | July | 573.2 | 3.9% | 3.8% |
| INTERNATIONAL TRADE | | | | |
| Merchandise exports (\$ billions) | August* | 34.8 | -0.6% | 3.3% |
| Merchandise imports (\$ billions) | August* | 30.7 | 2.6% | 3.7% |
| Merchandise trade balance (all figures in \$ billions) | August* | 4.1 | -1.0 | 0.0 |
| MANUFACTURING | | | | |
| Shipments (\$ billions) | August | 43.9 | 0.6% | 2.9% |
| New orders (\$ billions) | August | 44.3 | 3.0% | 5.0% |
| Unfilled orders (\$ billions) | August | 46.8 | 0.8% | -4.1% |
| Inventory/shipments ratio | August | 1.43 | 0.01 | -0.08 |
| PRICES | | | | |
| Consumer Price Index (1992=100) | September* | 120.1 | 0.0% | 2.3% |
| Industrial Product Price Index (1997=100) | August | 107.6 | 0.6% | 0.4% |
| Raw Materials Price Index (1997=100) | August | 115.8 | 1.1% | 1.5% |
| New Housing Price Index (1992=100) | August | 111.0 | 0.5% | 4.2% |

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

* new this week

† percentage point

¹ 1997 replaces 1992 as the base year used in determining prices for gross domestic product by industry. Also, valuation has been changed from factor cost to basic prices.

² Calculation of the rates of capacity use is now based on the 1997 North American Industrial Classification System (NAICS), which has replaced the 1980 Standard Industrial Classification.

Infomat

A weekly review

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BUSINESS REGISTER

Canadian Business Patterns

June 2002

61F0040XCB

various prices

CANADIAN CENTRE FOR JUSTICE STATISTICS

Juristat: Pilot analysis of recidivism among convicted youth and young adults

1999/2000

85-002-XIE

8/70

Juristat: Pilot analysis of recidivism among convicted youth and young adults

1999/2000

85-002-XPE

10/93

CULTURE, TOURISM AND THE CENTRE FOR EDUCATION STATISTICS

Focus on culture, Vol. 14, no. 1

87-004-XIE

7/20

Focus on culture, Vol. 14, no. 1

87-004-XPB

9/27

International travel, advance information

August 2002

66-001-PIE

6/55

DISTRIBUTIVE TRADES

Wholesale trade

August 2002

63-008-XIB

14/140

INTERNATIONAL TRADE

Canadian international merchandise trade

August 2002

65-001-XIB

14/141

Canadian international merchandise trade

August 2002

65-001-XPB

19/188

Imports by commodity

August 2002

65-007-XMB

37/361

Imports by commodity

August 2002

65-007-XPB

78/773

LABOUR AND HOUSEHOLD SURVEYS ANALYSIS

Perspectives on labour and income

October 2002

75-001-XIE

5/48

MANUFACTURING, CONSTRUCTION AND ENERGY

Carbon dioxide equivalent emissions by the iron and steel industry

1998

57F0008XIE

50

Primary iron and steel

August 2002

41-001-XIB

5/47

Refined petroleum products

June 2002

45-004-XIB

16/155

Steel wire and specified wire products

August 2002

41-006-XIB

5/47

PRICES

The Consumer Price Index

September 2002

62-001-XIB

8/77

The Consumer Price Index

September 2002

62-001-XPB

11/103

Note: Many Census-related products were released this week. They can be found at Statistics Canada's website (www.statcan.ca). Go to *The Daily* of October 22, 2002.

Catalogue numbers with an -XIB or an -XIE extension are Internet versions (B signifies bilingual, E signifies English); those with -XMB or -XME are microfiche; and -XPB or -XPE denote the paper version. XDB means the electronic version on diskette, while -XCB denotes a compact disc.

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