



Infommat

A Weekly Review

Friday, September 26, 2003

INSIDE

◆ SPOTLIGHT: The Internet

This week's *Spotlight* is on the Internet. New data show that more Canadian households are now plugged into the Internet than are not. And, now that the majority of households are online, the pace of growth in Internet use has leveled off.

◆ Retailers enjoy third straight month of sales gains

Retail sales rose for the third straight month in July, capping off a series of strong gains among key economic indicators. Retailers sold a record \$26.6 billion in goods and services, up 0.8% from June. Strong auto sales were responsible for the bulk of the growth.

◆ Non-reserve Aboriginal population more affected by chronic conditions

Nearly one-half of Aboriginal adults who live in non-reserve areas of Canada report the presence of one or more chronic conditions, according to the first results from the 2001 Aboriginal Peoples Survey.

Slowest increase in inflation in 13 months

Canada's rate of inflation as measured by the Consumer Price Index fell to its lowest level in 13 months in August. Consumers paid 2.0% more for goods and services in the CPI basket than they did a year earlier, down from 2.2% in July.

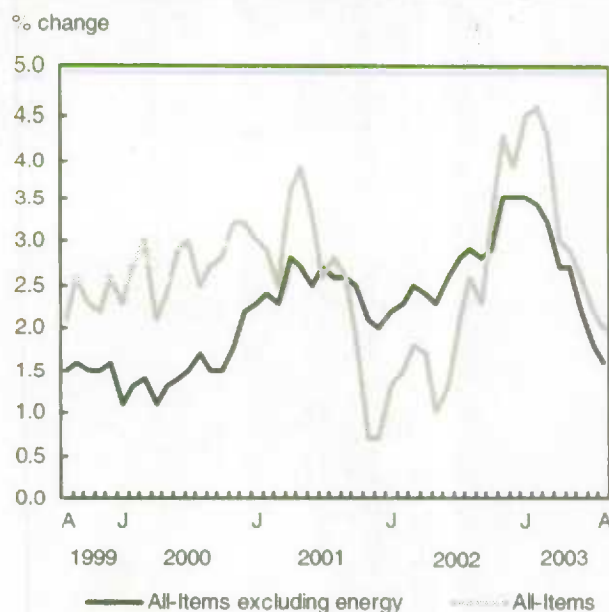
Rising automobile insurance premiums, as well as prices for natural gas and gasoline were primarily responsible for the increase.

The gain in August was the lowest year-over-year increase since July 2002 when the rate of inflation rose 2.1%. The rate has been declining steadily this year since its most recent high of 4.6% in February.

The core inflation rate, which excludes the eight most volatile components as defined by the Bank of Canada, increased 1.5%, slightly slower than the year-over-year increase of 1.8% in July.

(continued on page 2)

Rate of inflation lowest since July 2002

Statistics
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Canada

Canada

Slowest increase... (continued from page 1)

Automobile insurance premiums rose 21.8% in August, most of the gain occurring in the first half of the 12-month period. The industry cited rising health care costs, larger claims payouts, fraud and falling returns on its investments as contributing factors.

Consumers paid 7.6% more for energy, the bulk of the gain attributable to a 51.4% increase in the price of natural gas, and a 6.3% rise in gasoline prices. The natural gas index rose mostly as a result of higher prices in Ontario (+49.5%), and the impact of a payment to Northern Alberta customers following the sale of a gas field last year. The natural gas index for Alberta was lowered by this payment between March and September 2002.

Other factors contributing to the increase were homeowner replacement costs, September's tuition fee increases, homeowner insurance premiums, and prices for cigarettes and food purchased from restaurants.

On the other hand, an 8.4% drop in electricity prices had a small moderating effect. Downward pressure also came from lower prices for travel accommodation, costs of autos and beef. Auto prices fell 1.9% in the wake of manufacturers' incentives. Beef prices were down 9.5%, the result of trade restrictions on Canadian beef by the United States and other countries.

Travel accommodation prices were 13.6% below last August's levels. The tourism industry continued to face the impact of a higher Canadian dollar, the SARS epidemic and a general economic slowdown.

On a monthly basis, the CPI continued its slow upward trend, rising 0.2% in August, compared with July. A 9.0% increase in the price of gasoline, the biggest advance since March 2002, accounted for nearly all of the upward pressure. This was almost entirely offset by lower prices for fresh vegetables, autos and beef.

Gasoline prices rose in all provinces, ranging from 2.7% in Newfoundland and Labrador to a high of 11.1% in both British Columbia and Ontario. Increases were due to reduced gasoline inventories in the United States and high summer demand.

Consumers paid 12.1% less for fresh vegetables as more locally grown produce became available. Auto prices were down 0.8%, while beef prices tumbled 8.3%, their fourth straight monthly decline.

For more information, contact Joanne Moreau (613-951-7130), Prices Division.

Health products lead gains for large retailers

Health and personal care products led the way in July for Canada's largest retailers, who recorded sales of \$7.3 billion, up 5.2% from the same month last year.

All seven major commodity groups returned to positive territory, although sales in the clothing, footwear and accessories sector rose only 0.7%, the weakest gain.

Retailers sold \$686 million in health and personal care products, up 13.2% from July 2002. Sales were propelled upward by on-going strength in the sale of prescription and over-the-counter drugs, which includes vitamins, herbal remedies and other health supplements. Sales of toiletries and personal care products, excluding cosmetics and fragrances, were also strong, rising 10.2%.

Clothing prices were down 4.6% from July 2002, while footwear sales fell 3.4%. Much of the growth in this commodity group came from accessory sales such as luggage and leather goods (+8.3%) and jewellery and watches (+7.6%).

Sales of home electronics, such as televisions and audio-video equipment, cameras, computer software, and telephones and home office supplies, surged 17.2%, the largest increase in over a year.

These largest retailers represent about 38% of total annual retail sales, excluding recreational and motor vehicle dealers.

For more information contact Client Services (1-877-421-3067; 613-951-3549), Distributive Trades Division.

SPOTLIGHT: The Internet

Internet growth slowing after years of rapid gains

More Canadian households are now plugged into the Internet than are not, according to new data from the Household Internet Use Survey. And, now that the majority of households are online, the pace of growth in Internet use has leveled off, after rapid gains during the late 1990s.

Internet use was highest among households with members who surfed at home. These households accounted for just over one-half (51%) of the total in 2002, up from 49% in 2001. In 2002, about 6.3 million households had at least one member who regularly used the Internet from home, up 7% from 2001. This was only a fraction of the 23% growth in 2001, and the 42% increase the year before.

Households with high income, members active in the labour force, those with children still living at home and people with higher levels of education have been in the forefront of Internet adoption. Because the majority of these households have already adopted the Internet, the capacity to sustain high growth rates has been much reduced.

On a broader level, an estimated 7.5 million households had at least one member who used the Internet regularly in 2002 – either from home, work, school, a public library or another location. This was an increase of only 4% from 2001, far below gains of 19% in 2001 and 24% the year before.

These households accounted for 62% of the nearly 12.2 million households in 2002, a slight increase from the previous year. Between 1997 and 2001, the proportion of households using the Internet regularly almost doubled from only 29% to 60%.

The survey showed continued growth in Internet connections by cable from home. In 2002, an estimated 2.2 million households,

3.8 million households have never used the Net

About 3.8 million Canadian households had never used the Internet in 2002. The vast majority (85%) consisted of families without children or one-person households, and many were in below-average household income levels.

About 896,000 households indicated that a member of the household either used the Internet infrequently, or had pulled the plug. The size of this group has remained relatively unchanged over the past three years. Of these former or infrequent users, 402,000 had a computer at home. Asked why they no longer used the Internet, 32% said they didn't have a need or interest in using it.

or 35%, reported regular Internet access from home through a cable connection. This was up from 1.75 million, or 26%, in 2001. Most of the remaining households, almost 4 million, connected using a phone line.

Although households with the highest incomes still had the highest penetration rates, Internet use continued to make gains among households in the lowest income level. The HIUS divided households into four equal groups based on income, each representing 25% of the income spectrum from highest to lowest.

In 2002, 78% of households in the highest income group had a member who used the Internet from home. In contrast, among the households in the lowest income group, only 25% had a member who used the Internet from home. However, this proportion had increased five-fold from only 5% in 1997.

For more information, contact Jonathan Ellison (613-951-5882), Science, Innovation and Electronic Information Division.

Canada a global leader in high-speed Internet access

Canadians have emerged as global leaders in the adoption of broadband Internet technologies, with almost half of regular home users and the majority of business Internet users connecting using broadband, according to the first comprehensive study of high-speed Internet access.

In 2001, over 2.8 million households subscribed to the Internet using broadband. These accounted for nearly one-half (49%) of all Canadian households regularly using the Internet from home.

In addition, broadband has emerged as a standard business tool among large enterprises throughout the private sector, although the pattern among smaller firms is less consistent.

Overall, take-up rates in the household and business environments place Canada among the world's leaders in broadband use, ranking second only to South Korea among OECD countries on a per capita basis.

This study uses data from five Statistics Canada surveys and Industry Canada's *Broadband for rural and northern development pilot program* to detail broadband use by households and industry, as well as the supply and availability of broadband technologies.

In terms of households, broadband use increases from east to west. Six out of 10 households (61%) in British Columbia regularly using the Internet at home were connected using broadband. This compares with only 39% of households in the Atlantic provinces.

You can read the study "High-speed on the Information Highway: Broadband in Canada" in the Connectedness series (56F0004MIE, no. 10), free of charge on Statistics Canada's website (www.statcan.ca).

For more information, contact Ben Veenhof (613-951-5067), Science, Innovation and Electronic Information Division.

Retailers enjoy third straight month of sales gains

Retail sales rose for the third straight month in July, capping off a series of strong gains among key economic indicators. Retailers sold a record \$26.6 billion in goods and services, up 0.8% from June.

However, the increase was narrow-based as strong auto sales were responsible for the bulk of the growth. Excluding sales by motor and recreational vehicle dealers, the largest component of the automotive sector, retail sales would have declined 0.4%. July's level surpassed the peak of \$26.5 billion in February.

The growth in retail trade follows strong monthly gains in manufacturing shipments, wholesale sales and Canada's international exports.

Motor and recreational vehicle dealers posted sales of almost \$7.2 billion, up 4.2%, their largest monthly sales increase in five months. Car dealers have incurred wide fluctuations in sales so far this year, possibly because of shifting demand by consumers due to the use of aggressive incentive programs.

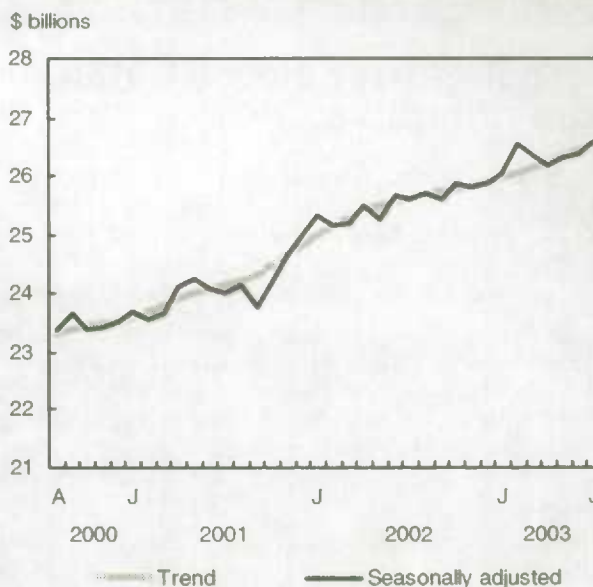
Higher gasoline prices at the pump led to a 2.1% gain in the sales value reported by gasoline service stations, following a 0.7% increase in June. These gains followed three months of significant declines.

The second largest increase in July (+1.3%) was recorded by retailers in the furniture sector who still appear to be benefiting from an active housing market. On a year-to-date basis, housing starts are up 5.4% in the first seven months of the year compared with the same period last year, while furniture sales are up 4.8%.

Drug stores enjoyed their seventh consecutive monthly increase in sales, with a 0.7% gain in July. Sales in drug stores have generally been increasing since the spring of 2000.

Elsewhere, sales in clothing stores fell 1.7% in July; food retailers reported their second monthly sales decline since the start of 2003; and lower sales in department stores led to a 0.2% decline in the general merchandise sector. Despite July's decline,

Third consecutive monthly gain for retail trade



sales in clothing stores have gained strength since the start of 2003, after remaining essentially flat last year.

Retail sales advanced in all provinces except Quebec where they fell 0.3%. July's growth was particularly strong in Alberta, New Brunswick, Nova Scotia, Prince Edward Island and Ontario, where retailers enjoyed sales increases above 1.0%.

The sales decline reported by Quebec retailers in July followed two consecutive monthly gains. While retail sales in Quebec advanced in the automotive, furniture and drug sectors, the decline in food stores was more pronounced than in any other province.

For more information, contact Paul Gratton (613-951-3541), Distributive Trades Division.

Research and development in the health field

The higher education sector accounted for 59% of the expenditures in research and development in the health field last year and was the main driving force behind a 7.7% increase in this sector, according to new preliminary estimates.

The higher education sector, which includes universities and teaching hospitals, performed just under \$2.6 billion on research and development in health, up 9.9% from 2001. Businesses performed almost \$1.6 billion, up 4.7%.

In total, governments, businesses, educational institutions and non-profit organizations spent just over \$4.4 billion in the health area in 2002.

The gain occurred despite a slight drop in total spending on research and development nationally. The health field is an important element of research and development, accounting for one-fifth (21%) of total spending on research and development last year.

The public sector increased its funding for research and development on health by 9.3% last year, while the private sector's contribution rose 6.5%.

Spending on research and development in health represents a growing proportion of the total research and development expenditures in Canada, estimated at \$20.7 billion in 2002. In 2002, health spending accounted for 21%, up from just under 20% in 2001 and about 15% in 1990.

For more information contact Antoine Rose (613-951-9919), Science, Innovation and Electronic Information Division.

Non-reserve Aboriginal population more affected by chronic conditions

Nearly one-half of Aboriginal adults who live in non-reserve areas of Canada report the presence of one or more chronic conditions, according to the first results from the 2001 Aboriginal Peoples Survey.

Some 45% of all Aboriginal adults reported the presence of one or more chronic conditions, the survey showed. The most common chronic conditions for the adult non-reserve Aboriginal population were arthritis or rheumatism, high blood pressure and asthma.

Among the adult population, 19% of the non-reserve Aboriginal people reported arthritis or rheumatism, nearly twice the proportion of 11% among the total Canadian population.

High blood pressure affected 12% of the Aboriginal people, compared with 8.7% among the total population, while 11.6% reported asthma, slightly higher than the 10.3% for the total population.

Diabetes was the fifth most prevalent health problem. It has become an important health issue because rates are rising among the Aboriginal population, particularly among non-reserve North American Indian adults.

Diabetes is being diagnosed at younger ages, is more severe when diagnosed and has high rates of complications. In 2001, 8.3% of non-reserve North American Indian adults stated that they had been diagnosed with diabetes compared to 5.3% in 1991. For the total Canadian population the age-standardized rate was 2.9%.

The percentage of Métis and Inuit adults diagnosed with diabetes remained almost the same from 1991 to 2001. For Métis adults, the 2001 rate was 5.9% compared with 5.5% in 1991. Among Inuit adults, the rate remained almost unchanged: 2.3% for 2001 compared to 1.9% in 1991.

Diabetes was particularly prevalent among older Aboriginal women in 2001. Among those aged 65 and over, one in four reported they had been diagnosed with diabetes, compared with one in 10 for all Canadian senior women.

For Aboriginal men the gap was smaller, with one in five reporting diabetes compared to one in seven for all Canadian senior men.

The APS data showed some promise for the new generation of Aboriginal young people. Seven out of 10 Aboriginal people (69%) aged 15-24 in non-reserve areas rated their health as very good or excellent, virtually on par with 71% of the total Canadian population in the same age group.

Aboriginal Peoples Survey

The report Aboriginal Peoples Survey 2001- Initial findings: Well-being of the non-reserve Aboriginal population (89-589-XIE) is available free on Statistics Canada's website (www.statcan.ca). It provides a statistical portrait of the Aboriginal identity population living in non-reserve areas, in urban, rural and Arctic regions of Canada.

The Aboriginal Peoples Survey (APS), which was conducted between September 2001 and June 2002, surveyed about 117,000 individuals to collect information regarding the lifestyles and living conditions of Aboriginal people.

Aboriginal identity population refers to those people who reported on the APS as being North American Indian, and/or, Métis and/or Inuit. Also included are those that did not identify as an Aboriginal person but who had registered Indian status as defined by the Indian Act of Canada and/or Band or First Nation membership.

The non-reserve population includes the over 700,000 Aboriginal people who do not live on Indian reserves, except in the Northwest Territories, in which case the total (on and off reserve) Aboriginal population is included. According to the 2001 Census, the total non-reserve Aboriginal population makes up about 70% of the total Aboriginal population in Canada.

Self-rated health status is considered a reliable indicator of health that successfully crosses cultural lines. The majority of non-reserve Aboriginal people (56%) reported that their health was excellent or very good. By comparison, 65% of the total Canadian population reported excellent or very good health.

While the total non-reserve Aboriginal population rated their health status lower than the total Canadian population, this gap was negligible among young adults. However, the gap between the health status of the Aboriginal population and the total Canadian population widened significantly in the older age groups. For every 10-year age group between the ages of 25 and 64, the proportion of Aboriginal people who reported their health as fair or poor was about double that of the total Canadian population.

This was even more pronounced among Aboriginal women. For example, 41% of Aboriginal women aged 55-64 reported fair or poor health, more than double the proportion of 19% of women in the same age group in the total Canadian population.

For more information contact Media Relations (613-951-4636), Communications Division.

Carbon dioxide emissions among highest in world

Canadian industries, governments and households produced an estimated 564 megatonnes of carbon dioxide in 2000, up from 434 megatonnes in 1981, a 30% increase.

On a per capita basis, each Canadian produced roughly 18.3 tonnes of carbon dioxide in 2000, one of the highest levels in the world. This was 30% higher than the average for member nations of the Organization for Economic Co-operation and Development.

From 1981 to 2000, carbon dioxide emissions per capita in Canada increased at an average rate of 0.25% a year, largely the result of an increase in the nation's standard of living, according to a new report.

However, during the same period, Canadians became more efficient in their use of energy and have been using forms of energy that increasingly generate fewer emissions per unit of energy consumed.

The country's "eco-efficiency," defined as the ratio of economic output for every unit of carbon dioxide emissions, improved at an average annual rate of 1.3% from 1981 to 2000.

Labour, capital and energy are marketed inputs that give rise to saleable output of goods and services. The production process also generates pollutants such as carbon dioxide emissions. To produce more goods and services, businesses may use more capital and more labour. But they may also produce more greenhouse gases.

Eco-efficiency grew more rapidly in the 1980s, when it increased at an annual average rate of 1.8%. During the 1990s, the growth in eco-efficiency slowed down to an average of 1.0%. Most of the gains during the 1990s were attributable to increased efficiency in the use of energy. The remainder was attributable to a switch from fuels with high carbon intensity to those with lower carbon intensity.

Improvements in eco-efficiency during the 1990s were not uniform across the nation. Gains were strongest in Newfoundland and Labrador (+3.2%), Prince Edward Island (+2.5%) and Quebec (+2.3%). In contrast, eco-efficiency actually declined 0.7% in Saskatchewan.

The manufacturing sector recorded a 1.8% increase in eco-efficiency during the 1990s, twice the rate of growth of 0.9% in the primary resource sector. Major carbon dioxide producers, such as utilities and crude petroleum and natural gas, improved their performance significantly.

For more information contact Tarek M. Harchaoui (613-951-9856), Micro-Economic Analysis Division.

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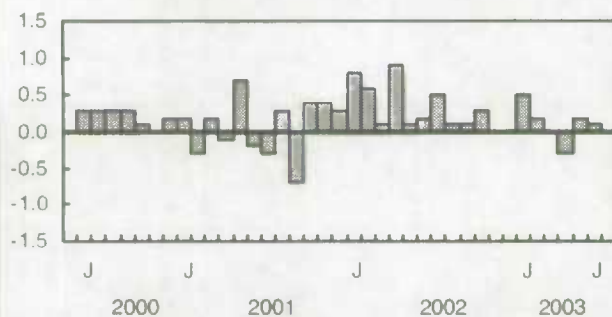
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Current trends

Gross domestic product

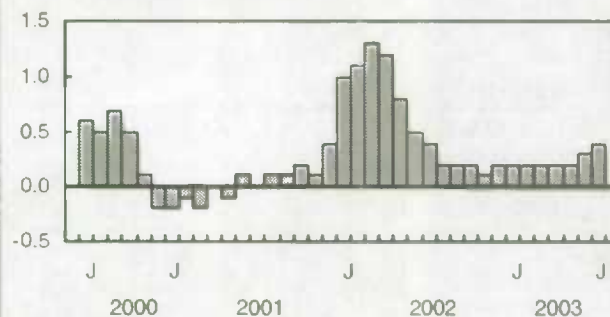
% change, previous month



Total economic activity edged up 0.1% in June, after a 0.2% gain in May.

Composite Index

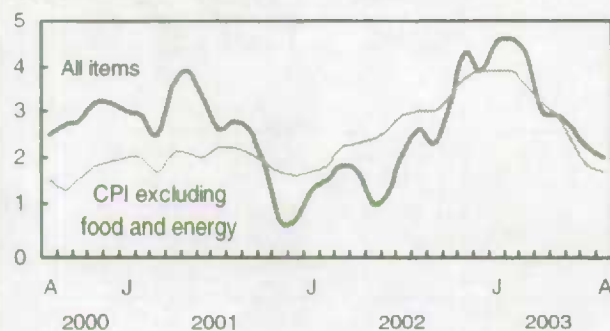
% change, previous month



The leading indicator grew 0.4% in July after rising 0.3% in June.

Consumer Price Index

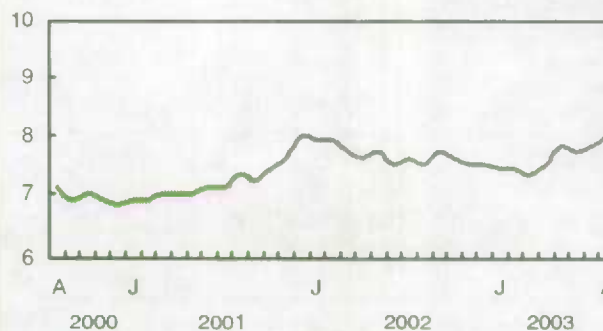
% change, previous year



Consumer prices for goods and services were 2.0% higher in August than they were a year earlier. Excluding food and energy, prices rose 1.7%.

Unemployment rate

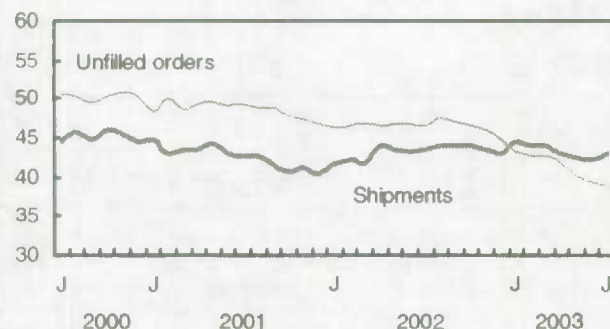
%



In August, the unemployment rate rose 0.2 percentage points to 8.0%.

Manufacturing

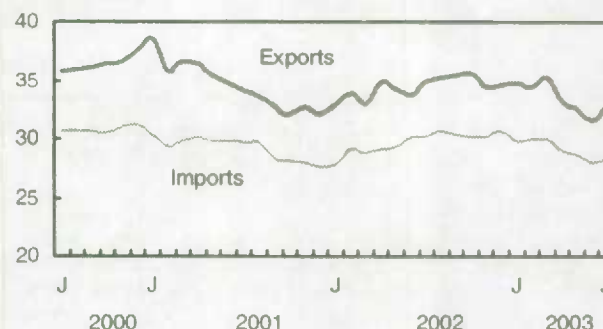
\$ billions



Manufacturers' shipments increased 1.7% in July to \$43.0 billion. The backlog of unfilled orders declined 0.4% to \$39.0 billion.

Merchandise trade

\$ billions



In July, the value of merchandise increased 1.1% to \$32.7 billion. Imports fell 0.3% to \$28.3 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	995.0	0.1%	1.9%
Composite Index (1992=100)	July	182.5	0.4%	2.4%
Operating profits of enterprises (\$ billions)	Q2 2003	40.4	-1.3%	11.7%
Capacity utilization rate (%) ²	Q1 2003	82.8	0.3†	1.2†
DOMESTIC DEMAND				
Retail trade (\$ billions)	July*	26.6	0.8%	3.8%
New motor vehicle sales (thousands of units)	July	143.5	12.6%	3.7%
Wholesale trade (\$ billions)	July*	36.2	1.1%	3.7%
LABOUR				
Employment (millions)	August	15.7	-0.1%	1.4%
Unemployment rate (%)	August	8.0	0.2†	0.5†
Participation rate (%)	August	67.5	0.0†	0.5†
Average weekly earnings (\$)	June	693.29	0.9%	2.1%
Regular Employment Insurance beneficiaries (in thousands)	May	561.4	2.7%	0.3%
INTERNATIONAL TRADE				
Merchandise exports (\$ billions)	July	32.7	0.5%	-6.7%
Merchandise imports (\$ billions)	July	28.3	1.2%	-5.9%
Merchandise trade balance (all figures in \$ billions)	July	4.4	-0.2	-0.6
MANUFACTURING				
Shipments (\$ billions)	July	43.0	1.7%	0.8%
New orders (\$ billions)	July	42.5	2.1%	-0.8%
Unfilled orders (\$ billions)	July	39.1	-1.5%	-16.6%
Inventory/shipments ratio	July	1.46	-0.03	1.42
PRICES				
Consumer Price Index (1992=100)	August*	122.5	0.2%	2.0%
Industrial Product Price Index (1997=100)	July	105.3	1.3%	-1.6%
Raw Materials Price Index (1997=100)	July	110.0	-1.5%	-2.4%
New Housing Price Index (1992=100)	July	116.7	0.3%	4.7%

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 Industry Classification System (NAICS), which has replaced the 1980 Standard Industrial Classification.

Infomat

A weekly review

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SUBJECT AREA Title of product	Period	Catalogue number	Price (\$) (issue/subscription)
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International travel, advance information	July 2003	66-001-PIE	6/55
CURRENT ECONOMIC ANALYSIS			
Canadian economic observer	September 2003	11-010-XIB	17/170
Canadian economic observer	September 2003	11-010-XPB	23/227
DISTRIBUTIVE TRADES			
Retail trade	July 2003	63-005-XIB	16/155
Wholesale trade	July 2003	63-008-XIB	14/140
HOUSING, FAMILY AND SOCIAL STATISTICS			
Aboriginal Peoples Survey 2001: Concepts and methods guide		89-591-XIE	Free
Aboriginal Peoples Survey 2001 – Initial findings: Well-being of the non-reserve Aboriginal Population		89-589-XIE	Free
Aboriginal Peoples Survey 2001: Initial release – Supporting tables		89-592-XIE	Free
Aboriginal Peoples Survey 2001 – Internet community profiles		89-590-XIE	Free
INCOME AND EXPENDITURE ACCOUNTS			
Income and expenditure accounts technical series: Government revenue attributable to tourism	1998	13-604-MIE2003041	Free
Income and expenditure accounts technical series: Government revenue attributable to tourism	1998	13-604-MPE2003041	Free
INDUSTRIAL ORGANIZATION AND FINANCE			
Quarterly financial statistics for enterprises	Q2 2003	61-008-XIE	26/86
INTERNATIONAL TRADE			
Canadian international merchandise trade	July 2003	65-001-XIB	14/141
Exports by commodity	July 2003	65-004-XPB	78/773
Exports by commodity	July 2003	65-004-XMB	37/361
Imports by commodity	July 2003	65-007-XPB	78/773
Imports by commodity	July 2003	65-007-XMB	37/361
LABOUR AND HOUSEHOLD SURVEYS ANALYSIS			
Perspectives on labour and income	September 2003	75-001-XIE	5/48
MANUFACTURING, CONSTRUCTION AND ENERGY			
Asphalt roofing	August 2003	45-001-XIB	5/47
Industrial chemicals and synthetic resins	July 2003	46-002-XIE	5/47
Monthly Survey of Manufacturing	July 2003	31-001-XIE	15/147
Particleboard, oriented strandboard and fibreboard	July 2003	36-003-XIB	5/47
Production and shipments of steel pipe and tubing	July 2003	41-011-XIB	5/47
Sawmills and planing mills	July 2003	35-003-XIB	9/86
Steel wire and specified wire products	July 2003	41-006-XIB	5/47
PRICES			
Consumer Price Index	August 2003	62-001-XIB	8/77
Consumer Price Index	August 2003	62-001-XPB	11/103
SCIENCE, INNOVATION AND ELECTRONIC INFORMATION			
Connectedness series: High-speed on the information highway: Broadband in Canada	No. 10	56F0004MIE2003010	Free
Science statistics: Estimates of total spending on research and development in the health field in Canada	1988 to 2000	88-001-XIB	6/59
SERVICE INDUSTRIES			
Restaurant, caterer and tavern statistics	June 2003	63-011-XIE	6/55
TRANSPORTATION			
Monthly railway carloadings	July 2003	52-001-XIE	8/77
Shipping in Canada	2000	54-205-XIE	39

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