



Infommat

A Weekly Review

Friday, April 9, 1999

OVERVIEW

◆ Sixth consecutive month of economic growth

Strength in demand at home and from the United States lifted gross domestic product in January by 0.2%. It was the sixth consecutive month of economic growth.

◆ Spending by foreign tourists continues to grow

In 1998, tourism spending in Canada grew, particularly the amount spent on accommodation and on food and beverage services. The growth rate of foreigners' spending was faster than that of Canadians' spending. In fact, the share of total tourism spending attributable to foreign visitors has been steadily increasing for nine years.

◆ Industrial product prices fall

Industrial product prices fell in February, pulling prices 0.5% below their level of a year earlier. The year-to-year decline would have been much larger if not for the effect of the exchange rate on Canadian goods priced in U.S. dollars.

◆ Raw material prices resume decline

After increasing in January, raw material prices resumed their decline in February. Prices were lower for crude oil, vegetable products and non-ferrous metals.

◆ Productivity growth more robust than previously reported

The growth in productivity during the 1990s has been somewhat more robust than previously reported. For the business sector, the growth in productivity in Canada since 1988 has been similar to that in the United States. However, the productivity of manufacturing industries in Canada has fallen farther behind those in the United States.

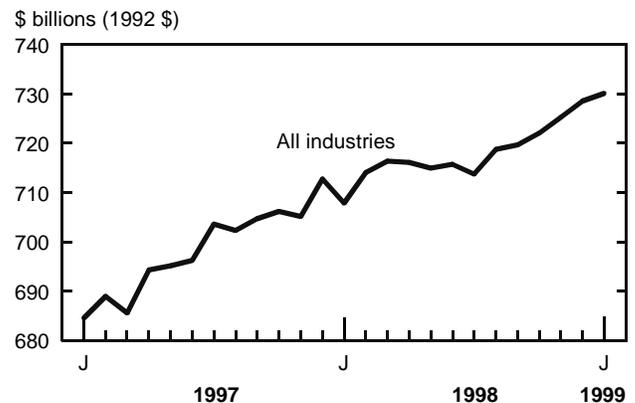
Sixth consecutive month of economic growth

Strong demand at home and from the United States lifted gross domestic product (GDP) by 0.2% in January. It was the sixth consecutive month of growth after a largely strike-induced lull in mid-1998. January's advance, unlike the five previous advances, was not bolstered in any significant way by strike recoveries.

After months of stagnant sales, retailing activity surged to a widespread gain of 1.6%. Wholesalers, however, reported their first drop in activity in a year (-0.8%) on lower shipments of computer equipment and automobiles. Manufacturers continued to benefit from a healthy U.S. economy and raised output for a sixth consecutive month (+0.3%). The fast-growing communications services industry advanced 1.2% on the basis of accelerating growth in long-distance and cellular telephone use. Activity in this industry stood 10.6% above the January 1998 level. Meanwhile, after a solid fourth quarter, the residential construction industry continued to show momentum.

The mining industry, still battered by weak commodity prices, lost ground after two months of modest gains. Output of crude oil and natural gas fell for a fourth consecutive month. The declines

Gross domestic product at factor cost



(continued on page 2)



... Sixth consecutive month of economic growth

were partly offset by continued gearing up of production in the nascent diamond mining industry and by a moderate increase in drilling and rigging activity, the third in a row.

In the manufacturing sector, higher output of electronic, wood and transportation products more than offset declines in the machinery, primary metal, and pulp and newsprint product industries. Twelve of 22 major industry groups, accounting for almost 60% of total manufacturing production, increased production in January.

Output of electrical and electronic products rose 2.4%, vaulting the industry past previous highs. A sharp increase in the electronic parts and components industry was mostly responsible, but an upswing by telecommunications equipment makers also contributed significantly. Makers of electrical equipment and communications wire and cable showed ongoing steady growth as well. The only significant decline was in the computer and peripheral equipment industry.

In the wood industries, production surged 4.1%. Booming housing-related demand from the United States and the start of a new quarter under the Canada-U.S. Softwood Lumber Agreement quotas spurred the output of sawmills by 5.9%. This was in line with a solid advance in exports of lumber. Many sawmills had run short of quota allotment before the end of December, and so had curtailed production rather than pay punitive export tariffs. In January, manufacturers of wooden doors, window frames and other related products also raised output significantly.

Manufacturing of transportation equipment increased 0.7%. Gains in the auto industry continued to moderate, however. Makers of vehicles and parts eked out a gain of 0.1%. Nevertheless, the auto industry's output remained at a record high, driven by strong U.S. demand and the recent gearing up of new production capacity. Aircraft production soared 4.1%, returning the industry to its steady growth path. Output in the railroad and rolling stock industry retreated 9.2% following the completion of several large contracts in December.

Output of machinery plunged 5.1%. Temporary closures and production cutbacks caused by weak demand continue to hobble this industry after well over a year of general decline. Makers of other machinery cut output the most in January, while makers of

Note to readers

The gross domestic product of an industry is the value added by labour and capital in transforming inputs purchased from other producers into outputs. The figures presented here are seasonally adjusted at annual rates and are valued at constant (1992) prices.

construction and mining machinery also cut production. After a steep downturn in the first half of 1998, output in the latter industry has stabilised during the last six months. Production of agricultural machinery was little changed in January, following a string of declines in the prior 12 months.

Primary metal producers curbed output in January by 1.2%. Iron foundries curtailed production the most, falling back from an auto-related upsurge in December. Aluminum and other rolling mills also cut back.

Production of paper and allied products edged down 0.8%. Makers of paper boxes and bags and other converted paper curtailed output. Despite soft demand for pulp and newsprint, January production held steady after December's steep increase, which was largely caused by several strike-idled mills returning to full production.

Elsewhere in the economy, output of transportation and storage services fell 0.5% due to a decline in activity at trucking firms and at grain elevators, the latter being partly attributable to a strike by federal grain handlers. In the finance industries, output declined 0.4%, largely because of a fall in banking activity. Providers of business services were busier in January as the Year 2000 problem continued to spur growth at computer service and consulting firms.

Available on CANSIM: matrices 4677-4681.

*The January 1999 issue of **Gross domestic product by industry (15-001-XPB, \$15/\$145)** presents the detailed report. For analytical information, contact Richard Evans (613-951-9145; evanric@statcan.ca). For information about purchasing data, contact Kim Lauzon (613-951-9417; lauzonk@statcan.ca), Industry Measures and Analysis Division. See also "Current Trends" on page 7.*

Spending by foreign tourists continues to grow

Tourism spending in Canada last year reached \$47.0 billion, an increase from 1997 of 7.0%. That growth rate was significantly higher than in 1997 (+5.3%) and 1996 (+4.7%). And in contrast with the two previous years, when the strength originated mainly from transportation expenditures, 1998 was marked by notable growth in spending on accommodation (+10.7%) and on food and beverage services (+9.0%). (Unless otherwise stated, the data are unadjusted for seasonality and are expressed at current prices.)

Of the \$47.0 billion expenditure on tourism last year, non-residents spent \$14.2 billion of it (30% of the total), while Canadians spent \$32.8 billion (70%). The non-residents' (or foreign visitors') share of total tourism spending has been steadily

increasing for nine years. Outlays by foreign visitors in 1998 were 11.4% higher than in 1997, which was more than double the growth rate seen in the expenditures by Canadians (+5.1%).

After accounting for inflation, 1998 tourism expenditures in the country increased at a hefty rate of 5.0%, reversing a downward trend that started in 1995. Substantial 9.0% growth in spending by non-residents was still the main source of the advance in overall demand, since Canadians spent just 3.3% more than in 1997, after accounting for inflation.

Prices for tourism goods and services rose faster last year than the rate of inflation on all goods and services. In 1998, the rate of inflation on tourism goods and services was 2.1%. In contrast, the Consumer Price Index for all items, a broader measure of price change, edged up during the year by 1%. The steepest price increases were in accommodation services (+4.5%).

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... Spending by foreign tourists continues to grow

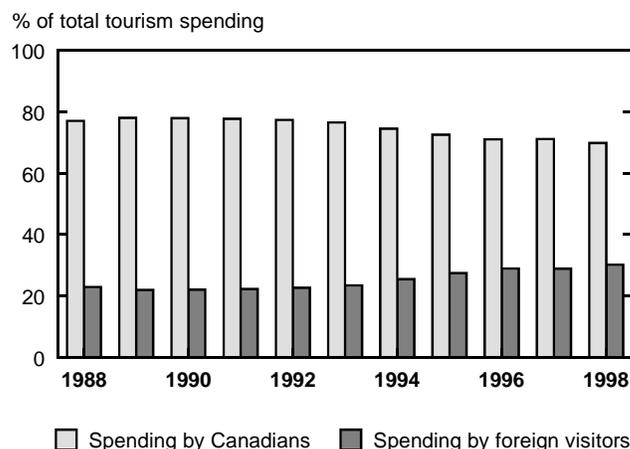
In 1998, the number of U.S. travellers to Canada rose sharply (+8.3%) compared with 1997, as our neighbours from south of the border benefited from a weaker Canadian dollar. The increase was 11.1% in the more expensive overnight trips, almost double the 6.9% rise in same-day visits. In contrast, the number of visitors from Europe fell for the second time in a decade (-2.4%). Meanwhile, the number of visitors from the Asian/Pacific market recorded an even bigger drop (-19.5%).

Employment generated by tourism (the number of part-time and full-time employees) grew 3.0% in 1998 to 518,000. The air transportation industry fared especially well, benefiting from increased passenger traffic. After three consecutive years when growth in tourism employment clearly outpaced that in the total business sector, these two advanced at a similar rate in 1998.

In the fourth quarter of 1998, tourism expenditures in Canada reached \$9.3 billion, up from the same period in 1997 by 7.0%. Visitors from other countries continued to set the pace with a 12.4% increase (to \$2.4 billion) in spending in Canada, more than double the increase in tourism outlays of Canadians (+5.3% to \$6.9 billion). In fact, expenditures by foreign visitors have led the way for 18 of the last 20 quarters.

The robust growth of tourism spending in the country during the fourth quarter was widespread, with important gains made in accommodation (+10.7%) and in food and beverage services (+8.9%). The transportation category, which advanced at a slower pace (+5.1%), still constitutes by far the largest component, at 43% of total tourism expenditures.

Shares of spending on tourism in Canada



Available on CANSIM: matrices 1835-1854.

The fourth quarter 1998 issue of *National tourism indicators* (13-009-XPB, \$21/\$70) is now available. To order, contact Client Services (613-951-3640; fax 613-951-3618). For further analytical information, contact Katharine Kemp (613-951-3814) or Jacques Delisle (613-951-3796), Income and Expenditure Accounts Division.

Industrial product prices fall

In February, industrial product prices fell 0.4%. This pulled prices 0.5% below their level of a year earlier. The 12-month decline would have been much larger if not for the effect of the exchange rate on Canadian goods priced in U.S. dollars. The most significant price decreases in February were for motor vehicles (-2.0%), pulp (-2.3%) and newsprint (-3.5%).

Between mid-January and mid-February, the value of the U.S. dollar weakened somewhat, declining from C\$1.53 to C\$1.49. In mid-February 1998, the value of the U.S. dollar was C\$1.44. Removing the effect that the exchange rate has on prices of exported goods quoted in U.S. dollars, industrial product prices in February would have edged up 0.2%, while the decline on a 12-month basis would have been -1.4%.

Motor vehicle prices fell in February by 2.0%, mainly due to the effect of the lower value of the U.S. dollar in terms of the Canadian dollar. About 90% of the vehicles made in Canada are exported, mostly to the United States. Export prices were down for both automobiles (-2.2%) and trucks (-2.3%). Domestically, automakers adjusted their incentive programs, and so prices declined marginally (-0.2% for autos and -0.3% for trucks).

The fall in export prices also played a very significant role in the declines of both pulp and newsprint prices. In the case of bleached sulphate pulp, which makes up more than four-fifths of Canadian pulp, export prices were down 1.9%; domestic prices only fell 0.1%. In the United States, pulp prices dropped 2.7%, perhaps due to concern in that country over demand for pulp

Exchange-rate effect on industrial prices, February 1999

	12-month change	Excluding exchange-rate effect
	%	
Manufacturers' prices		
All goods	-0.5	-1.4
Intermediate goods ¹	-2.1	-2.9
First stage goods ²	-7.1	-8.1
Second stage goods ³	-1.2	-1.9
Finished goods ⁴	1.8	0.6
Food and feeds	1.5	1.4
Capital goods	2.6	0.9
Other finished goods	1.4	-0.1
Other prices		
Raw material prices (RMPI)	-10.3	..
Retail prices (CPI)		
Food purchased from stores	1.4	..
Goods excluding food purchased from stores	-0.2	..
U.S. manufacturers' prices	-0.1	..

¹ Used as inputs into industry.

² Used as inputs into basic industries.

³ Used as inputs into other industries.

⁴ Used for immediate consumption or for capital investment.

.. Figures not available.

(continued on page 4)

... Industrial product prices fall

during the coming year. For newsprint, prices in Canada were down 0.7%, whereas export prices fell 3.7% because of concern in the newsprint industry over supply levels. In the United States, however, newsprint prices dipped only 0.1%.

Softwood lumber prices rose 1.3% as domestic prices increased in February by 1.0% and export prices advanced 1.3%. The increase in Canadian export prices would have been much larger except for the exchange-rate effect. In the United States, softwood lumber prices jumped 3.0%. Residential construction in the United States and in Canada contributed to the higher lumber prices. In February, housing starts in the United States remained close to January's 10-year high, while starts in Canada recovered the ground lost in January. Canadian softwood lumber prices rose

the most on the B.C. coast, where hemlock prices were a particularly important contributor. Overall, prices for hemlock and fir in British Columbia surged 7.3% after buyers from the southeastern United States entered the market.

For the four European G-7 member nations, the most recent figures for the 12-month change in industrial prices are as follows: Italy, -1.7% (January); Germany, -2.3% (January); France, -2.7% (January) and the United Kingdom, -0.2% or -0.7% excluding excise taxes (February).

Available on CANSIM: matrices 1870-1878.

*The February 1999 issue of **Industry price indexes** (62-011-XPB, \$22/\$217) will be available at the end of the month. For further information, contact Client Services (613-951-3350; fax: 613-951-1539; infounit@statcan.ca), Prices Division.*

Raw material prices resume their decline

After increasing in January, raw material prices resumed their decline in February with a drop of 1.8%. Lower prices for crude oil, vegetable products and non-ferrous metals were somewhat offset by higher prices for wood and animal products. Raw material prices have been following a downward trend since peaking in December 1996. Compared with February 1998, prices were down 10.3%; if mineral fuels (90% of which is crude oil) were excluded from the total, the 12-month change would have been -6.3%.

As a group, mineral fuel prices were down from January to February by 4.4%. This was primarily due to a decline in crude oil prices of 4.9%. Inventories of crude have been growing in the wake of a relatively mild winter. At the same time, the world's oil producers have not been successful in reducing output to match diminished demand for oil. Also in February, coal prices fell 2.8%, while natural gas prices were unchanged. On a 12-month basis, coal prices were relatively stable (+0.8%), whereas crude oil prices dropped substantially (-24.6%). In contrast, natural gas prices were up from a year earlier by 22.9%.

Prices for vegetable products fell from January by 4.5%, reflecting widespread declines. Sugar prices tumbled 19.2% as Brazil (the world's largest grower) aggravated the global supply glut by increasing its sugar exports. Sugar prices were 34.8% below their December 1997 peak. Prices fell for both soybeans (-7.1%) and canola (-6.1%) on news of ideal growing conditions in Brazil for soybeans. Plans to plant record soybean acreage in the United States put further downward pressure on prices. Elsewhere, wheat prices dropped 4.2% and coffee prices continued to move downward (-7.4%). Compared with February 1998, vegetable product prices were down a considerable 16.5%. At the forefront of this decline were lower prices for coffee (-39.0%) and unrefined sugar (-29.6%).

Non-ferrous metal prices lost ground in February (-3.6%), mainly due to declines in the "other refined metals" category. In the face of lower demand from Europe and Latin America, aluminum material prices were also down (-3.9%). Somewhat offsetting those declines, zinc concentrate prices climbed 7.4%. Zinc is used primarily by the steel industry as a rust inhibitor. Compared with a year earlier, non-ferrous metal prices were down 10.2%. Copper prices, which fell 8.8% over the year, have hit their lowest level in several years. As a result, copper industry profits have fallen, resulting in international mine closures.

Animal product prices remained stable in February (+0.5%). Hog prices rose a further 8.8% in February on the heels of January's 95.3% price surge. Optimism grew as the slaughter rate slowed and as expectations mounted that a potential U.S. food aid package to Russia might contain 50 000 tonnes of pork. Still, hog prices remained 15.1% below those of last February. Also from January to February, cattle prices edged down 0.7%, while chicken prices dropped 4.1%.

Wood prices increased in February by 0.7%, as log prices rose 1.0%. Overall, wood prices have remained stable since April 1998. The upturn in log prices was due in part to a substantial reduction in Japan's lumber inventories. Nonetheless, wood prices remained 3.1% lower than a year earlier, while log prices were off 3.5%. In contrast, pulpwood prices declined 0.3% in February and showed a yearly decrease of 1.7%. The pulp industry has been facing even tighter market conditions. Prices were down 2.2% in February and 8.7% on the year.

Iron ore prices, which have remained relatively stable over the past year, declined 2.2% in February. On a 12-month basis, prices were up 0.9%. However, there is reason to believe that this stability may be ending. Cuts to international selling prices have already been seen in Australia and Brazil.

Available on CANSIM: matrices 1879.

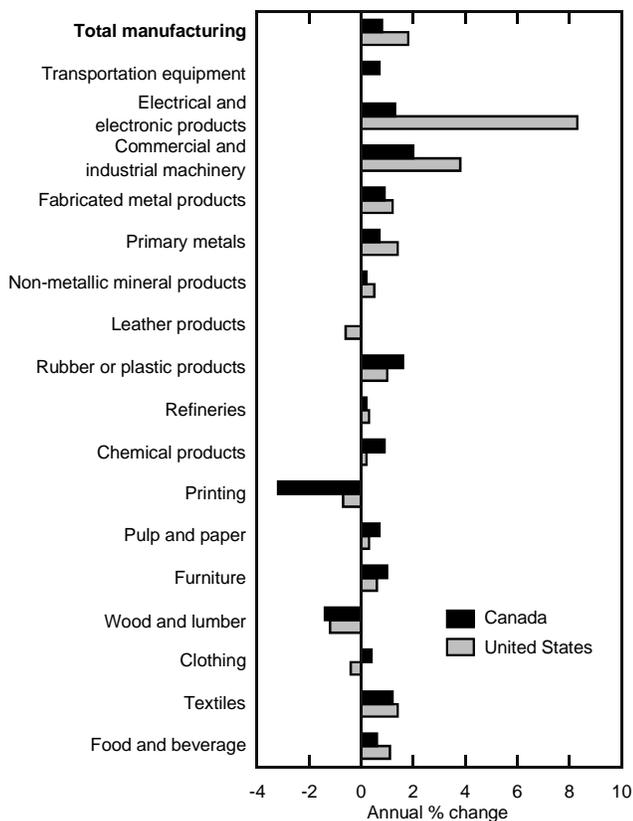
*The February 1999 issue of **Industry price indexes** (62-011-XPB, \$22/\$217) will be available at the end of this month. For further information, contact Client Services (613-951-3350; fax (613-951-1539; infounit@statcan.ca), Prices Division.*

Productivity growth more robust than previously reported

In 1997, the business sector's multi-factor productivity grew 2.9%. (The same rapid growth rate was shown in the labour productivity figures released last summer. See *Infomat* of August 14, 1998.) The latest data now show that productivity growth during the 1990s is more robust than previously reported. However, the underlying story remains intact: As in most industrialized countries, Canada's rate of productivity growth in the last two decades has been considerably slower than in the preceding period.

Canada's goods-producing industries, which include manufacturing, contributed most to the overall growth in multi-factor productivity in 1997. Overall, multi-factor productivity in these industries advanced 3.3%. This contrasts with an increase of 2.3% in the service industries. In manufacturing, multi-factor productivity climbed 3.9%—ending two years of virtually no change.

Multi-factor productivity in manufacturing industries, 1990 to 1995



Between 1988 and 1997, the country's goods producers outperformed its service producers in both multi-factor productivity and labour productivity. In particular, multi-factor productivity among goods-producing firms grew at an average annual rate of 0.9%, whereas it rose 0.3% among service-producing firms. These growth rates are similar to those observed during the 1980s.

Note to readers

Productivity is a measure of production efficiency that most economists regard as one important determinant of the standard of living. Its growth rate is calculated as the difference between the growth in the amount of output produced (real GDP) and the growth of the quantity of all inputs used, such as labour and machinery and equipment. Productivity is referred to as **multi-factor productivity** when all the factors of production are included.

A second measure of productivity, **labour productivity**, is output produced per hour worked. This measure does not directly consider other important factors such as capital. Economic performance as measured by labour productivity must be interpreted carefully, since these estimates reflect changes in the other factors of production, as well as growth in productive efficiency.

In the business sector, **goods-producers** include activities in agriculture, fishing, forestry, mining, manufacturing, construction and public utilities; services are transportation and storage, communications, wholesale and retail trade, finance, insurance and real estate, and community, business and personal services.

For various technical reasons, inter-country comparisons of productivity are especially difficult and subject to greater-than-normal uncertainty.

During the 1990s, the annual growth in overall multi-factor productivity averaged about 0.7%. This trend compares favourably with annual average growth of 0.5% in the 1980s and 0.6% during most of the 1970s. Given the difficulties inherent in measuring productivity, these averages are not significantly different from one another. Nevertheless, they are much weaker than the 1960's average annual growth rate of 2.1%.

In 1997, Canadian firms in the overall business sector outperformed their American counterparts in terms of multi-factor productivity growth (+2.9% versus +0.7%). Since the mid-1980s, multi-factor productivity estimates for the business sector show a slightly stronger annual performance in Canada (+0.7%) than in the United States (+0.4%). (Over the same period, labour productivity rose 1.1% per year in Canada and 1.2% in the United States.)

While there are only slight productivity differences between Canada and the United States as far as the whole business sector goes, the picture is quite different for the manufacturing industries. From 1961 to 1985, multi-factor productivity in Canadian and U.S. manufacturing grew at a similar pace of 1.1%. Since 1986, however, both labour and multi-factor productivity have grown more rapidly among U.S. manufacturers. In particular, multi-factor productivity has grown at a 1.4% rate annually in the United States since 1986 versus 0.6% growth in Canada. The productivity growth gap between manufacturers in Canada and the United States is quite a bit less than previously reported, though, mainly owing to downward revisions to U.S. estimates.

The gap between the two countries originates mostly in the United States in the outstanding performances of two industries: electrical products, and commercial and industrial machinery. These two industries include computers and computer parts. With

(continued on page 6)

... Productivity growth more robust than previously reported

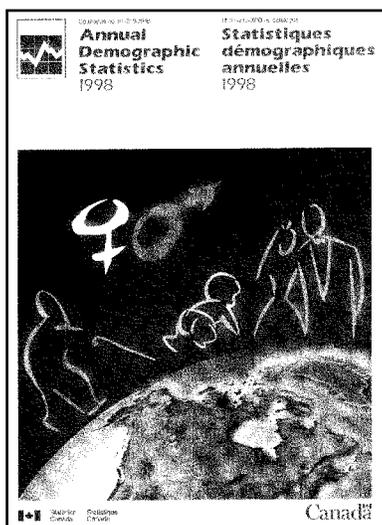
annual multi-factor productivity growth of 5.7% and 3.4% respectively since 1986, these two industries, which account for a much larger share of manufacturing in the United States than they do in Canada, far outperformed their counterparts in this country. As for the other manufacturing industries, the productivity gaps

between the two countries are much smaller. In fact, in some industries—pulp and paper, chemical products—Canadian manufacturers outperformed their American counterparts.

Available on CANSIM: matrices 9456-9458 and 9460-9483.

For further information, contact John Baldwin (613-951-8588) or René Durand (613-951-3278), Micro-economic Studies and Analysis Division (fax: 613-951-5403).

New from Statistics Canada



Annual demographic statistics 1998

The 1998 edition of *Annual demographic statistics* is the first to use 1996 Census data. It is also the first edition to include a CD-ROM with the publication. The CD-ROM adds historical depth to the comprehensive demographic data of the paper publication. The historical time series include population data back to 1971 for the provinces and territories and back to 1991 for census divisions and census metropolitan areas.

These annual statistics classify the most recent data on population by age and sex. The publication presents the latest data on census families, vital statistics and all levels of migration (including international, interprovincial, and migrations among census metropolitan areas and census divisions). The report includes population projections up to 2003, as well as population estimates and projections for the new territory of Nunavut and the remaining part of the Northwest Territories.

These demographic data are easy to retrieve and manipulate, so that users can make their own customised demographic analyses in a preferred spreadsheet software (the files can be opened in any recent spreadsheet software). The population figures on CD-ROM are the best denominators to calculate any per capita rates required for market research, quantitative analysis and planning.

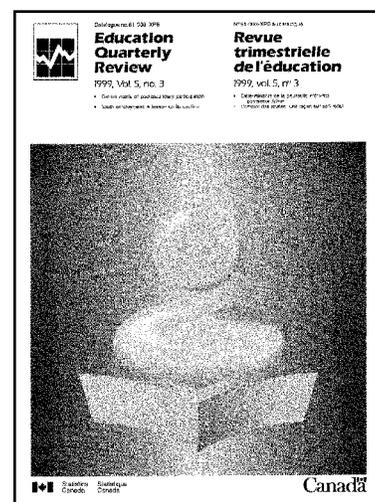
The 1998 edition of *Annual demographic statistics* (paper: 91-213-XPB, \$125 including the CD-ROM; Internet: 91-213-XIB, \$56 excluding the CD-ROM) is now available. For further information, contact Lise Champagne (613-951-2320; fax: 613-951-2307; chamlis@statcan.ca), Demography Division.

Education quarterly review 1999, Vol. 5, no. 3

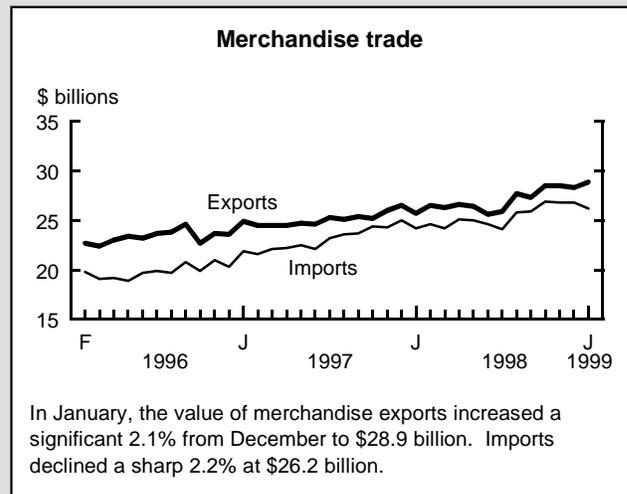
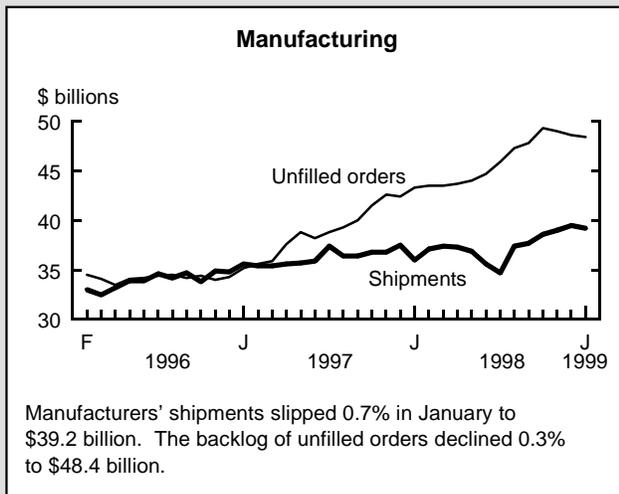
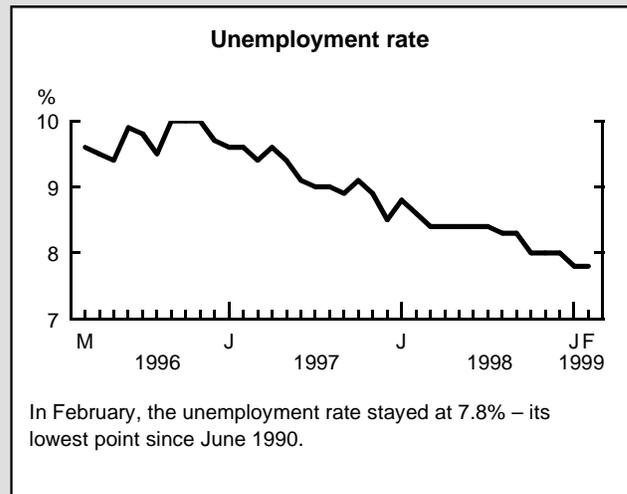
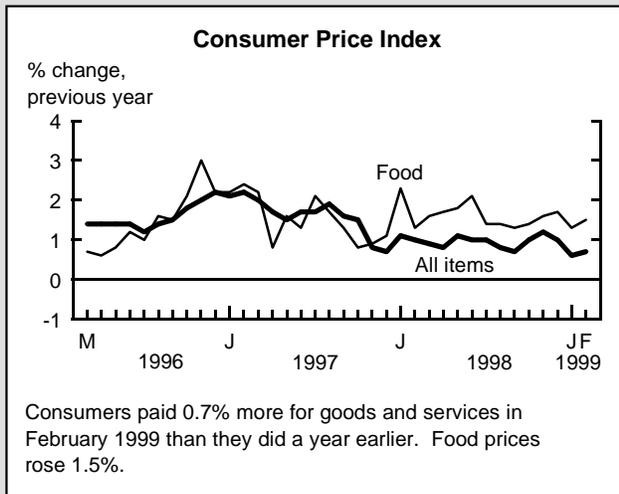
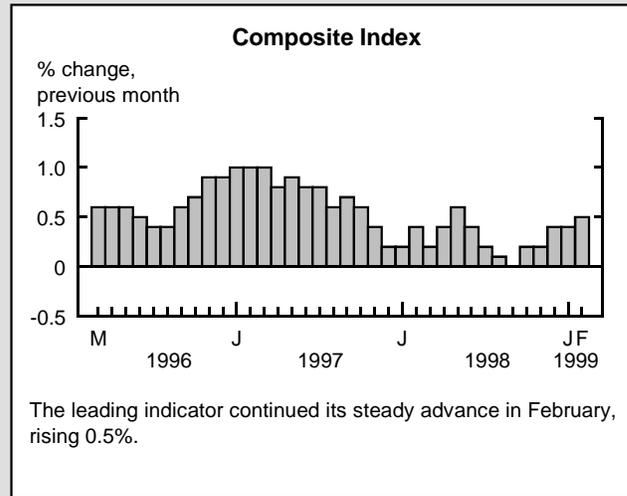
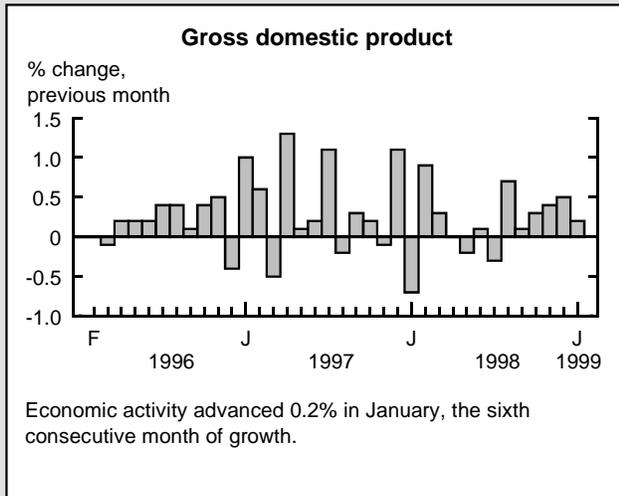
The latest issue of *Education quarterly review* features two articles on important issues in education. The first, "Determinants of post-secondary participation", examines various factors (such as educational attainment of parents, sex, language and family type) that simultaneously affect the odds of participating in post-secondary education. The second feature article, "Youth employment: A lesson on its decline", analyzes the change in the youth employment rate between 1989 and 1997 in term of three components: changes in school enrolment, falling employment among full-time students, and changes in the employment rate of part-time students and youths who have left school.

Each issue of *Education quarterly review* also includes a series of social, economic and education indicators for Canada, the provinces and territories, and the G-7 countries.

The Vol. 5, no. 3 issue of *Education quarterly review* is now available (paper: 81-003-XPB, \$21/\$68; Internet: 81-003-XIB, \$16/\$51). For further information, contact Jim Seidle (613-951-1500; fax: 613-951-9040; seidjim@statcan.ca), Centre for Education Statistics.



Current trends



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

Latest statistics

	Period	Level	Change, previous period	Change, previous year
GENERAL				
Gross domestic product (\$ billion, 1992)	January	730.1	0.2%	3.1%
Composite Index (1981=100)	February	211.1	0.5%	3.9%
Operating profits of enterprises (\$ billion)	Q4 1998	28.7	15.1%	- 1.0%
Capacity utilization (%)	Q4 1998	82.5	0.7†	- 0.9†
DOMESTIC DEMAND				
Retail trade (\$ billion)	January	21.2	1.7%	5.1%
New motor vehicle sales (thousand of units)	January	122.5	3.6%	15.0%
LABOUR				
Employment (millions)	February	14.66	0.1%	3.4%
Unemployment rate (%)	February	7.8	0.0†	- 0.8†
Participation rate (%)	February	65.8	0.0†	0.8†
Labour income (\$ billion)	January*	39.3	- 0.2%	2.6%
Average weekly earnings (\$)	January	605.24	- 0.6%	- 0.2%
Help-wanted Index (1996=100)	March*	148	0.0%	7.2%
INTERNATIONAL TRADE				
Merchandise exports (\$ billion)	January	28.9	2.1%	12.7%
Merchandise imports (\$ billion)	January	26.2	- 2.2%	8.3%
Merchandise trade balance (all figures in \$ billion)	January	2.7	1.2	1.2
MANUFACTURING				
Shipments (\$ billion)	January	39.2	- 0.7%	8.9%
New orders (\$ billion)	January	39.1	0.8%	5.9%
Unfilled orders (\$ billion)	January	48.4	- 0.3%	11.6%
Inventory/shipments ratio	January	1.26	0.00	- 0.07
PRICES				
Consumer Price Index (1992=100)	February	109.1	0.2%	0.7%
Industrial Product Price Index (1992=100)	February	119.4	- 0.4%	- 0.5%
Raw Materials Price Index (1992=100)	February	101.5	- 1.8%	- 10.3%
New Housing Price Index (1992=100)	January	100.3	0.0%	0.5%

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

* new this week

† percentage point

Infomat

A weekly review

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