



Infomat

A Weekly Review

Thursday, April 20, 2000

OVERVIEW

◆ Large retailers' sales of home furnishings and electronics set record

In January, large retailers' sales of home furnishings and electronics climbed 12.6%—the largest yearly sales growth ever for the category. That growth moved it ahead of health and beauty products.

◆ Most consumer spending related to motor vehicles

Last year, consumers spent more on motor vehicles and related parts and services than they did on food, non-alcoholic beverages, clothing and footwear combined.

◆ Household demand remains strong

The leading indicator grew in March 1.1%, about the same as the 1.0% advance posted in February. These gains reflect the strength of household demand at the start of the new year.

◆ New vehicle sales off to a slow start this year

In February, the number of new motor vehicles sold dropped 4.4%. This was the second decline to follow on the heels of December's sizeable 9.3% gain.

◆ Tourism spending reaches all-time high

Last year, spending on tourism in Canada reached an all-time high of \$50.1 billion, for an annual increase 6.5%. Foreign visitors' spending represented 30% of the total, a share that has been growing steadily for 10 years.

◆ Public-sector employment remains stable

The public sector employed an average of just under 2.8 million people last year, an increase of 900 jobs from 1998.

Large retailers' sales of home furnishings and electronics set record

In January, large retailers' sales of home furnishings and electronics climbed 12.6%—the largest yearly sales growth ever recorded for the category. That growth moved it ahead of health and beauty products, sales of which rose 9.8%. Health and beauty products had held the top spot since July 1999.

Large retailers' sales in January totalled \$5.1 billion. That represented sales growth from January 1999 of 1.4%. Excluding vehicle dealers, the group of large retailers made 37% of January's total retail sales. Large food retailers accounted for 42% of the group's total sales, compared with 45% in January 1999. Despite the loss of Eaton's, the share for department stores remained relatively stable at 20%.

In the home furnishings and electronics category, sales advanced at double-digit rates for indoor furniture (+13.6%), household appliances (+13.2%), home electronics (+13.2%) and home furnishings (+10.3%). In January, sales of home furnishings and electronics accounted for 15% of the large retailers' total sales, up from 13% in January 1999.

Large retailers' sales

Not seasonally adjusted

| | January 1999 | January 2000 | January 1999 to January 2000 |
|------------------------------------|-----------------|-----------------|---------------------------------------|
| | \$ millions | | % change |
| All commodities | 5,027 | 5,100 | 1.4 |
| Food and beverages | 2,071 | 1,960 | -5.4 |
| Clothing, footwear and accessories | 789 | 801 | 1.5 |
| Home furnishings and electronics | 672 | 757 | 12.6 |
| Health and personal care products | 392 | 431 | 9.8 |
| Housewares | 255 | 263 | 2.8 |
| Sporting and leisure goods | 182 | 198 | 8.5 |
| Hardware, lawn and garden products | 153 | 148 | -3.5 |
| All other goods and services | 512 | 543 | 6.0 |

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... Large retailers' sales of home furnishings and electronics set record

Their sales of hardware, lawn and garden products were down 3.5%. A combination of high sales in January 1999 and unseasonably warm winter temperatures this year contributed to lower monthly sales of such products as snowblowers.

Sales figures for the fourth quarter of 1999 reveal that large retailers accounted for 30% of purchases made from all retail stores. If sales by motor and recreational vehicle dealers are excluded, the share of sales made by the group jumps to 39%. Large retailers accounted for 41% of total food and beverage sales.

Strong fourth-quarter sales of health and beauty products at large retailers pushed their market share for these products up from 31% in the fourth quarter of 1998 to 33%. Much of the push came from higher sales of prescription and over-the-counter drugs, which vaulted from the year-earlier quarter by 31.7%. In the fourth quarter of 1999, large retailers accounted for 23% of the total retail sales of prescription and over-the-counter drugs. That compares with 20% in the year-earlier quarter.

Note to readers

The group of large retailers surveyed is composed of around 80 of Canada's largest companies in the food, clothing, home furnishings and electronics, sporting goods and general merchandise sectors of retail trade. This article relies upon year-over-year comparisons of sales. These were affected by changes in the composition of the group of large retailers, especially within the food sector, where several supermarket chains have restructured. All data in this release are unadjusted for seasonal factors.

Higher fourth-quarter sales of sporting and leisure goods pushed the large retailers' market share for these products up slightly to just more than 39%. In the latest fourth quarter, the large retailers sold 36% of hardware, lawn and garden products, 54% of home furnishings and electronics, 59% of clothing and footwear, and 66% of housewares.

To order data, or for general information, contact Client Services (613-951-3549 or 1 877 421-3067; retailinfo@statcan.ca). For further analytical information, contact Catherine Draper (613-951-0669; drapcat@statcan.ca), Distributive Trades Division.

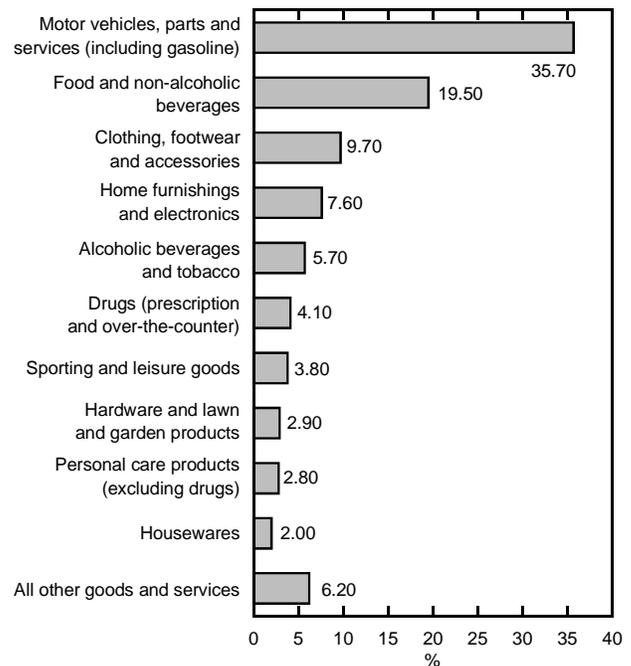
Most consumer spending related to motor vehicles

Last year, consumers spent more on motor vehicles and related parts and services than they did on food, non-alcoholic beverages, clothing and footwear combined. Of every \$100 of retail spending in 1999, consumers in Canada purchased \$35.70 worth of motor vehicles and related parts and services (includes gasoline), \$19.50 worth of food and non-alcoholic beverages and \$9.70 worth of clothing, accessories and footwear.

Spending in retail stores last year totalled \$261.2 billion, up from 1998 by 5.8%. Of all the major commodity groups, automotive fuels, oils and additives—affected by rising prices in the latter half of the year—posted the largest annual sales growth (+12.3%). Home furnishings and electronics, which recorded the second largest gain (+10.5%), were strong all year. Throughout 1999, consumers spent \$19.9 billion on these items at retail stores. Within the category, sales of electronics made the largest annual advance (+14.4%), as consumers stocked up on the latest gadgets. Also selling well were indoor furniture (+11.2%) and home furnishings (+7.8%). Appliances saw the smallest gain of the group (+6.5%).

Consumer shopping patterns shifted throughout the year. For most of last year, Canadians bought 60% of their home furnishings and electronics from a specialty store. In fourth quarter, however, that market share fell to 56%, as general merchandise stores (which include department stores) and auto supply stores gained ground during the holiday period.

Consumers' retail spending, 1999



In 1999, Canadians spent \$18.1 billion on health and personal care products, 9.4% more than in 1998. Health and personal care products include cosmetics, drugs (prescription and over-the-

(continued on page 3)

... Most consumer spending related to motor vehicles

counter), vitamins, eyewear, and other toiletries. Although drugstores captured most of the market for these products, their market share fell from 62% in 1998 to 59% last year, as consumers turned to other types of retailers to buy these products. For example, consumers spent \$3.2 billion on these products at food stores last year, 23.7% more than they did in 1998. Consequently, the food stores' share of this market grew by 2.0 percentage points to 18%.

To order data, or for general enquiries, contact Client Services (613-951-3549; 1 877 421-3067; retailinfo@statcan.ca), Distributive Trades Division. For analytical information about sales of retail commodities, contact Janet Sear (613-951-5580), Distributive Trades Division.

Note to readers

The Quarterly Retail Commodity Survey provides data, at the national level, of the goods and services sold at various types of retail stores. All commodity sales figures mentioned in this article (levels or shares) are derived from purchases at retail stores and not from purchases at any other source. Any quarterly data have not been adjusted for seasonal factors.

Stores that primarily sell computer hardware and software, office equipment or building and lumber supplies are classified as wholesalers and are not included here. New vehicle sales include the full selling price and include leased vehicles at their full selling price.

Household demand remains strong

The leading indicator grew 1.1% in March, about the same as the 1.0% advance posted in February. These gains reflect the strength of household demand at the start of the new year, as manufacturing and the U.S. leading index slowed.

In March, the housing index recorded a second straight gain. Construction of single-family homes took over from multiple-units as the buttressing support of housing starts, which hit their highest two-month total since 1992. For a second month in a row, the strength in housing demand spurred on furniture and appliance sales. Spending on other durable goods continued to grow at twice the pace of three months ago. All these gains in household

spending reflect buoyant consumer confidence, bolstered by the strength in labour and stock markets.

New orders for durable goods posted their smallest gain in six months, as machinery dipped in line with the slowdown in investment intentions for this year. Business services employment eked out another small increase compared with the rapid gains it saw in 1998 and 1999.

In the United States, new orders for capital goods also slowed the growth of the U.S. leading indicator. Among other declines, building permits dipped as interest rates rose.

The April 2000 issue of *Canadian economic observer* (11-010-XPB, \$23/\$227) is now available. For further information, contact Francine Roy (613-951-3627), Current Economic Analysis Group. See also "Current trends" on page 7.

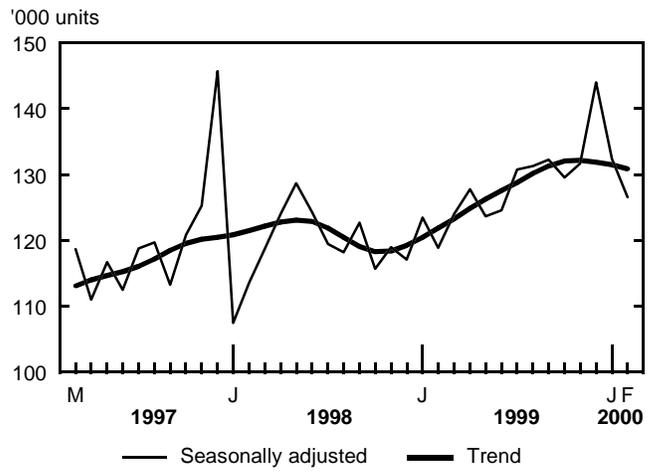
New vehicle sales off to a slow start this year

In February, the number of new motor vehicles sold dropped 4.4% to 126,593 vehicles. This was the second decline to follow on the heels of December's sizeable 9.3% gain. The upward movement seen in new vehicle sales since the end of 1998 has faltered in recent months.

Cars and trucks both contributed to the sales decline in February. The number of new cars sold fell to 66,550, a drop from January of 5.2%. This was the second monthly decline following seven consecutive advances that began in June 1999 and ended in December with a 12.4% surge.

Also for a second consecutive month, sales of new trucks declined in February (-3.4%). Overall, since the summer of 1999, truck sales have remained relatively stable but have lost ground compared with car sales. Last summer, truck sales accounted for a 49% market share. That declined to a 47% share in February.

Sales of new motor vehicles



(continued on page 4)

... New vehicle sales off to a slow start this year

From January to February, the number of new vehicles sold fell in every province except Manitoba. The largest decreases were in Newfoundland (-11.2%) and Quebec (-10.6%). In Manitoba, new vehicle sales were up 0.9%. However, sales have been fairly stagnant in the province since the fall of 1998.

The February 2000 issue of *New motor vehicle sales* (online at www.statcan.ca: 63-007-XIB, \$13/\$124) presents the full report. Seasonally adjusted provincial data from January 1991 to date are available on request. To order data, or for general information, contact Client Services (613-951-3549, 1 877 421-3067,

Note to readers

Cars include those used for personal and commercial purposes (such as taxis or rental cars). Trucks include minivans, sport-utility vehicles, light and heavy trucks, vans, coaches and buses. All data are seasonally adjusted.

retailinfo@statcan.ca), Distributive Trades Division. For analytical information, contact Clérance Kimanyi (613-951-6363, kimacle@statcan.ca), Distributive Trades Division.

Tourism spending reaches all-time high

Last year, spending on tourism in Canada by Canadian tourists and foreign visitors reached an all-time high of \$50.1 billion. That marked an increase from 1998 of 6.5%, slightly slower than the previous year's annual increase (+7.0%). The strength last year came mainly from spending on transportation. After removing inflation, tourism spending last year rose 3.2%. That compares with a 5.0% increase in 1998.

Tourism spending in Canada

Not seasonally adjusted

| | 1998 | 1999 | 1998 to 1999 |
|-------------------------------|----------------------------------|-------------|-----------------|
| | \$ billions at current prices | | % change |
| Total tourism spending | 47.0 | 50.1 | 6.5 |
| Foreigners | 14.2 | 15.3 | 7.7 |
| Canadians | 32.8 | 34.8 | 6.0 |
| Transportation | 18.5 | 20.1 | 8.5 |
| Foreigners | 3.6 | 3.9 | 8.5 |
| Canadians | 14.9 | 16.2 | 8.5 |
| Accommodation | 6.7 | 7.1 | 5.1 |
| Foreigners | 3.2 | 3.4 | 8.4 |
| Canadians | 3.6 | 3.6 | 2.1 |
| Food and beverage services | 7.7 | 8.1 | 5.0 |
| Foreigners | 3.3 | 3.5 | 7.6 |
| Canadians | 4.4 | 4.6 | 3.1 |
| Other tourism commodities | 4.8 | 5.1 | 5.7 |
| Foreigners | 1.3 | 1.4 | 7.8 |
| Canadians | 3.5 | 3.6 | 4.9 |
| Other commodities | 9.3 | 9.8 | 5.3 |
| Foreigners | 2.8 | 3.0 | 6.2 |
| Canadians | 6.5 | 6.8 | 4.8 |

Note to readers

Data are not adjusted for seasonal factors and are expressed at current prices, unless otherwise noted.

Foreign visitors spent \$15.3 billion of last year's total tourism outlays, up 7.7% compared with a jump of 11.4% in 1998. Canadian tourists spent \$34.8 billion of the total, a rise of 6.0%. That compares with a spending increase in 1998 of 5.1%.

The amount spent by foreign visitors to Canada represented 30% of the total last year; Canadian tourists accounted for the other 70%. The foreigners' share of total tourism spending has been steadily growing for the last 10 years. Their spending accounted for 22% of total tourism spending in Canada in 1989 and 25% in 1994.

The number of foreign visitors travelling to Canada climbed for a seventh consecutive year last year (+2.1%). After surging 8.3% in 1998, the number of travellers from the United States rose only 1.8%. From all other countries, the number of travellers recovered and climbed 5.2%. That followed an 8.3% drop in 1998. Mainly, this recovery stemmed from more travellers from Europe—up 4.1% after a 2.4% decline in 1998—and from the Asia-Pacific region—up 7.0% following a 19.5% tumble in 1998.

In 1999, prices of goods and services purchased by tourists rose faster (+3.8%) than the inflation rate shown by the Consumer Price Index for all goods and services (+1.8%). Prices that increased the most were those for transportation (+4.5%) and accommodation services (+4.6%). The higher transportation costs reflected the rising price of fuel.

Employment generated by tourism activities grew 1.2% last year to total 524,300 part-time and full-time employees. In 1998, the job growth in tourism was 3.0%. Last year, the job growth in tourism was outpaced by that of the entire business sector (+3.5%).

The most recent 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; iead-info-dcrrd@statcan.ca). For further analytical information, contact Katharine Kemp (613-951-3814), Income and Expenditure Accounts Division.

Public-sector employment remains stable

Employment levels in the public sector remained stable in 1999. The public sector employed an average of just under 2.8 million people last year, an increase of 900 jobs from 1998—the first increase in seven years. The largest increases occurred in Ontario (+4,700 jobs) and Alberta (+4,300). Public-sector employment declined the most in Quebec (-12,000).

Even after several years of tighter budgetary control and restructuring by governments, there are as many people working in the public sector today as there were in 1985. However, there were less than 92 public-sector employees per 1,000 persons in 1999, down from more than 108 in 1985.

Public sector employment¹, 1999

| | Persons employed ² | % change, previous year |
|-----------------------|-------------------------------|-------------------------|
| Canada | 2,798,970 | -- |
| Newfoundland | 55,572 | -0.2 |
| Prince Edward Island | 15,134 | -5.0 |
| Nova Scotia | 102,681 | -1.6 |
| New Brunswick | 81,085 | 2.6 |
| Quebec | 719,031 | -1.6 |
| Ontario | 958,253 | 0.5 |
| Manitoba | 130,776 | 2.4 |
| Saskatchewan | 111,921 | 0.8 |
| Alberta | 259,329 | 1.7 |
| British Columbia | 345,650 | 0.1 |
| Yukon | 4,705 | -4.4 |
| Northwest Territories | 8,172 | -25.2 |
| Nunavut | 3,005 | 0.0 |
| Outside of Canada | 2,998 | 2.1 |

¹ Excludes government public enterprises.

² The Canada total may differ from the sum of the components due to rounding.

-- Amount too small to be expressed.

Note to readers

Employment is measured monthly and averaged for the year. The public sector contains all institutional units controlled by governments. Federal government includes the military. Provincial/territorial government includes general government at those levels, universities and colleges, and health and social services institutions. Local government includes school boards.

The stability of public-sector employment reflects trends in government employment, which accounts for almost 91% of the public-sector workforce. In 1999, federal, provincial/territorial and local governments employed just over 2.5 million people, virtually unchanged from 1998.

Employment edged slightly lower in two of the three levels of government. The provincial/territorial governments' workforce slipped by 1,800 employees (-0.1%) to 1.3 million. Hospitals and universities in Quebec, as well as colleges in Ontario, accounted for the provincial/territorial decline.

The federal government (including the military) employed an average of 330,000 people in 1999, down 0.3% or 970 jobs from 1998. A decrease in the military of 2,400 jobs more than offset a 1,400-job increase in general government employees.

By contrast, local government employment increased by 2,200 jobs to 894,000 in 1999. Increases in the local governments' workforce were highest in Ontario (+2,660) and Alberta (+1,800).

Public business enterprises, which account for the remaining portion of the public sector, registered a second consecutive annual increase. In 1999, public business enterprises employed 262,000 people, up 0.6% or 1,500 jobs from the previous year.

For general information on products and services related to this subject, or to order, contact Jo-Anne Thibault (613-951-0767; fax: 613-951-0661; jo-anne.thibault@statcan.ca). For further analytical information, contact Robert Sauvé (613-951-8306; robert.sauve@mxai.statcan.ca), Public Institutions Division.

New from Statistics Canada

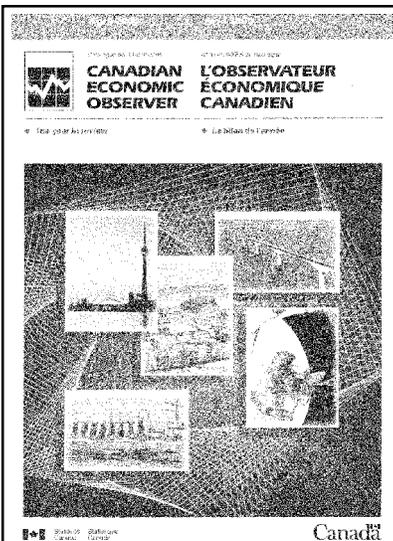
Canadian economic observer

April 2000

The April 2000 issue of Statistics Canada's flagship publication for economic statistics, *Canadian economic observer*, analyses the current economic conditions, summarises the major economic events that occurred in March and presents a feature article. This month's feature is the annual year-end review of the economy. It chronicles how the burst of growth at the end of the decade reversed many of the trends established through the 1990s.

A separate statistical summary presents the principal economic indicators for Canada, the provinces and the major industrial nations.

The April 2000 issue of *Canadian economic observer* (11-010-XPB, \$23/\$227) is now available. For further information, contact Cyndi Bloskie (613-951-3634; ceo@statcan.ca), Current Economic Analysis Group.



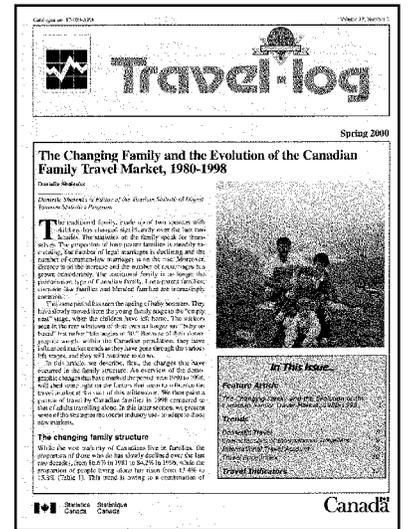
New from Statistics Canada

Travel-log Spring 2000

The spring 2000 issue of *Travel-log*, Statistics Canada's quarterly tourism newsletter, features an article titled "The changing family and the evolution of the Canadian family travel market, 1980-1998". First, it describes changes that have occurred in the family structure with a view to shedding light on factors that seem to influence today's travel market. Second, it describes the travel patterns of Canadian families in 1998 compared with that of adults travelling alone. The article closes with a look at some strategies used by the tourism industry to adapt to these new markets.

Each quarter, *Travel-log* also examines the trends of the Travel Price Index, profiles the latest travel indicators, looks at travellers' characteristics and updates readers on the international travel account.

The spring 2000 issue of *Travel-log* (print: 87-003-XPB, \$13/\$42; online at www.statcan.ca: 87-003-XIE, \$5/\$16) is now available. For more information, contact Monique Beyrouiti (613-951-1673, fax: 613-951-2909; beyrmon@statcan.ca), Culture, Tourism and the Centre for Education Statistics.

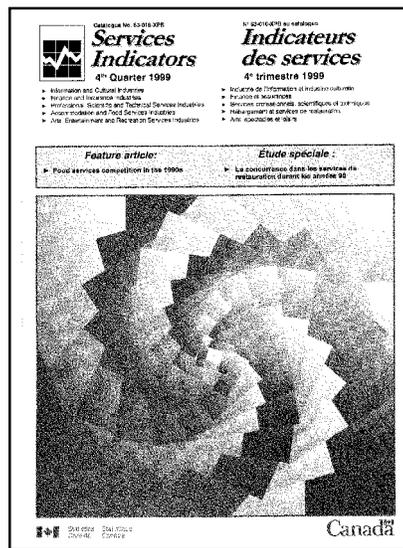


Services indicators Fourth quarter 1999

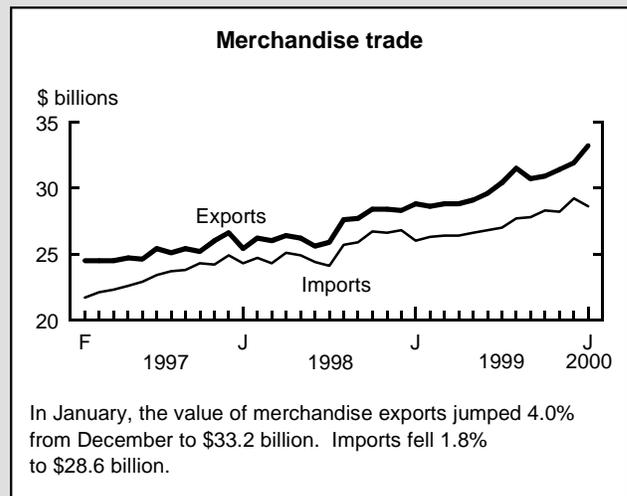
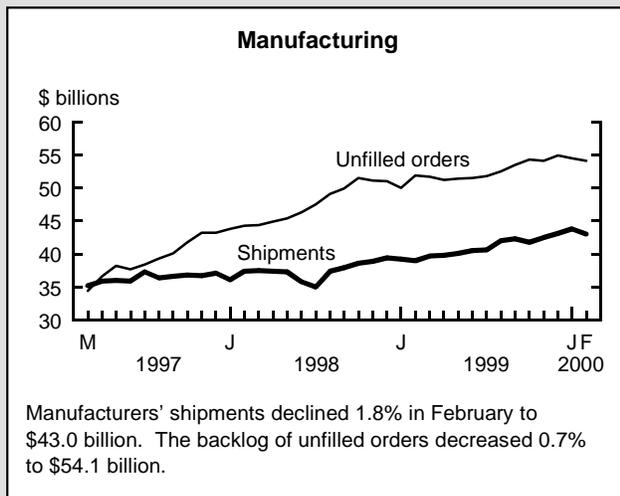
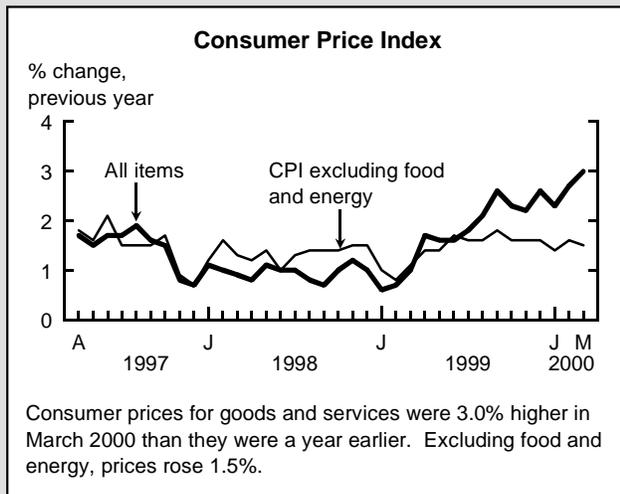
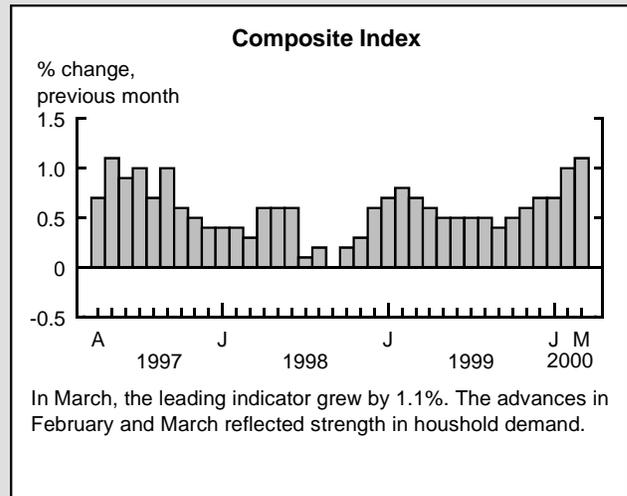
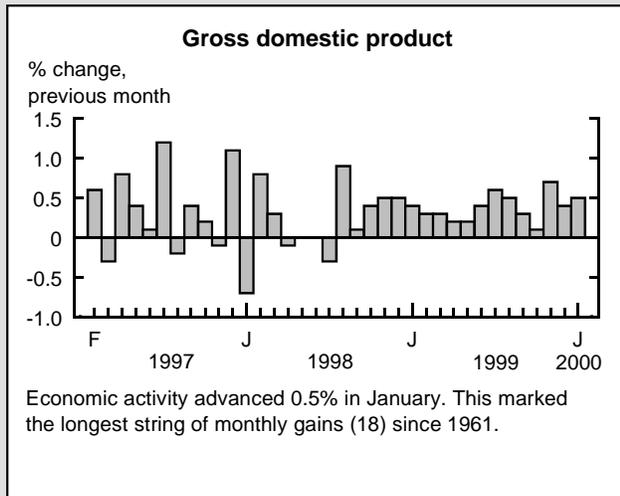
This issue of *Services indicators*, Statistics Canada's quarterly profile of service industries, features an article titled "Food services competition in the 1990s". It examines how food service providers and food stores competed for Canadians' food dollars in the 1990s and how this intense competition affected both industries. The article outlines some reasons for changes in both the demand for and the supply of each industry's outputs. It also profiles in detail some characteristics of the consumer market for food services.

In addition to the feature article, each issue contains updated tables and charts that show the output, employment and remuneration figures for various service industries over the past eight quarters.

The fourth quarter 1999 issue of *Services indicators* (online at www.statcan.ca: 63-016-XIB, \$26/\$87; print: 63-016-XPB, \$35/\$116) is now available. For more information, contact Don Little (613-951-6739; littdon@statcan.ca), Services Industries Division.



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 | 770.1 | 0.5% | 4.7% |
| Composite Index (1992=100) | March* | 160.1 | 1.1% | 7.9% |
| Operating profits of enterprises (\$ billion) | Q4 1999 | 43.9 | 7.8% | 27.1% |
| Capacity utilization (%) | Q4 1999 | 86.8 | 1.3† | 4.0† |
| DOMESTIC DEMAND | | | | |
| Retail trade (\$ billion) | January | 22.5 | 0.0% | 6.7% |
| Department store sales (\$ billions) | February | 1.49 | -2.5% | 1.5% |
| New motor vehicle sales (thousand of units) | February* | 126.6 | -4.4% | 6.5% |
| Wholesale trade (\$ billion) | January | 31.2 | 0.2% | 9.5% |
| LABOUR | | | | |
| Employment (millions) | March | 14.86 | 0.2% | 3.2% |
| Unemployment rate (%) | March | 6.8 | 0.0† | -1.1† |
| Participation rate (%) | March | 65.9 | 0.1† | 0.4† |
| Average weekly earnings (\$) | January | 618.85 | 0.3% | 2.0% |
| Help-wanted Index (1996=100) | March | 171 | 0.6% | 11.8% |
| INTERNATIONAL TRADE | | | | |
| Merchandise exports (\$ billion) | January | 33.2 | 4.0% | 15.1% |
| Merchandise imports (\$ billion) | January | 28.6 | -1.8% | 9.9% |
| Merchandise trade balance (all figures in \$ billion) | January | 4.5 | 1.8 | 1.8 |
| MANUFACTURING | | | | |
| Shipments (\$ billion) | February* | 43.0 | -1.8% | 10.3% |
| New orders (\$ billion) | February* | 42.6 | -1.7% | 4.2% |
| Unfilled orders (\$ billion) | February* | 54.1 | -0.7% | 4.2% |
| Inventory/shipments ratio | February* | 1.31 | 0.04 | 0.00 |
| PRICES | | | | |
| Consumer Price Index (1992=100) | March* | 112.8 | 0.7% | 3.0% |
| Industrial Product Price Index (1992=100) | February | 125.8 | 0.9% | 5.9% |
| Raw Materials Price Index (1992=100) | February | 139.7 | 3.2% | 37.1% |
| New Housing Price Index (1992=100) | February | 102.4 | 0.4% | 2.1% |

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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Publications released from April 13 to 19, 2000

| Division/Title of publication | Period | Catalogue number | Price (\$) (issue/subscription) |
|---|--------------------------------|--------------------------|---------------------------------|
| BALANCE OF PAYMENTS AND FINANCIAL FLOWS Canada's international transactions in securities | January 2000 | 67-002-XPB | 18/176 |
| CULTURE, TOURISM AND THE CENTRE FOR EDUCATION STATISTICS Touriscope, vol. 16, no. 2: international travel | February 2000 | 66-001-PPB | 8/73 |
| DISTRIBUTIVE TRADES Wholesale trade | January 2000 | 63-008-XIB | 14/140 |
| INDUSTRY MEASURES AND ANALYSIS Gross domestic product by industry | January 2000 | 15-001-XPB | 15/145 |
| MANUFACTURING, CONSTRUCTION AND ENERGY Oils and fats Primary iron and steel | February 2000 February 2000 | 32-006-XIB 41-001-XIB | 5/47 5/47 |
| PRICES Consumer price index | March 2000 | 62-001-XPB | 11/103 |
| PUBLIC INSTITUTIONS Public sector statistics | 1998/99 | 68-213-XIB | 46 |
| SERVICE INDUSTRIES Services indicators Internet Paper | Q4 1999 | 63-016-XIB 63-016-XPB | 26/87 35/116 |
| TRANSPORTATION Railway carloadings | February 2000 | 52-001-XIE | 8/77 |

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