



Infomat

A Weekly Review

Friday, September 10, 1999

OVERVIEW

◆ **Domestic demand source of economy's healthy performance**

The healthy performance of the economy continued into the second quarter, as real GDP advanced 0.8%. Strength in domestic demand led the way. The second quarter's advance followed 1.0% growth in the first quarter.

◆ **Current account deficit up slightly**

The deficit on current account transactions increased slightly in the second quarter to \$1.3 billion. The higher deficit was led by service transactions, notably for transportation and travel.

◆ **Manufacturers lead monthly GDP growth**

In June, the economy advanced for an 11th consecutive month as gross domestic product (GDP) increased 0.3%. The strength was concentrated in manufacturing, construction, wholesale trade and business services.

◆ **Consumers flock to department stores**

In July, the sales of department stores increased 3.1%—the second largest monthly advance so far this year.

◆ **International travel deficit more than doubles**

The deficit in the international travel account more than doubled in the second quarter. Mostly, this was because Canadians travelling south of the border boosted their spending at the same time that Americans travelling north spent less.

◆ **Tourism from overseas recovers**

In the first quarter, international visitors made 2.6 million overnight trips to Canada. Although the vast majority of those travellers were American, the number of visitors from overseas countries rose a hefty 9.4%.

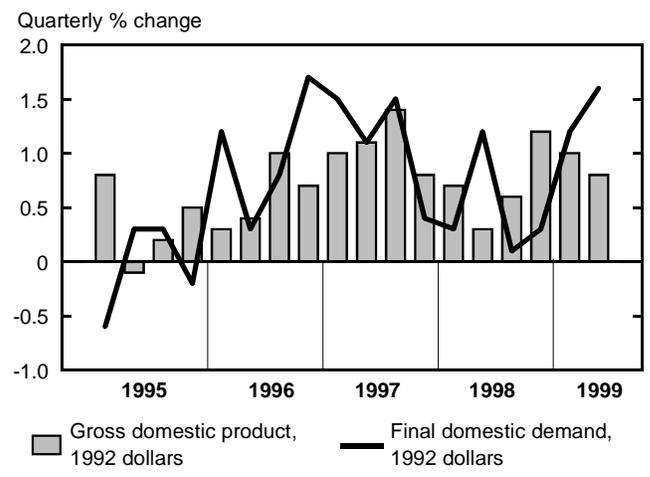
Domestic demand is source of economy's healthy performance

Real gross domestic product (GDP) advanced in the second quarter by 0.8%. This nearly matched the solid growth achieved in the two prior quarters. Strength in domestic demand led the way, as investment grew strongly in machinery and equipment and in housing. Investment also swelled substantially in manufacturing and wholesale inventory.

The strong growth of investment in machinery and equipment was led by computer purchases, which soared more than 20% in the second quarter as businesses and governments prepared for Year 2000 compliance. Virtually every other category of investment in machinery and equipment posted a solid gain, too. Investment in telecommunications equipment jumped 7.9% and investment in transportation equipment (other than cars and trucks) advanced 6.6%. Once again, the only shadow was investment in farm machinery and equipment, which declined 3.5% in tandem with falling farm incomes.

The housing market was again a source of strength, as residential investment increased 3.6%. New housing construction, renovations

GDP and final domestic demand



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... Domestic demand is source of economy's healthy performance

and resale activity all registered healthy gains. The overall growth in housing investment was concentrated in the resale market, however, where ownership transfer costs on the sale of existing homes surged 11.4%.

Non-farm business inventories piled up in the second quarter. Manufacturers of transportation equipment built up inventories of goods-in-process, while makers of electrical and electronic products accumulated inventory at all stages of production. At the wholesale level, inventories of machinery and equipment and of other durable goods swelled in parallel with rising imports. At the retail level, there was a smaller inventory buildup, concentrated in non-durable goods. Farm inventories also rose.

Gross domestic product at 1992 prices¹

	% change	Annualized % change	Year-over-year % change
Second quarter 1998	0.3	1.1	3.2
Third quarter 1998	0.6	2.6	2.4
Fourth quarter 1998	1.2	4.8	2.8
First quarter 1999	1.0	4.2	3.2
Second quarter 1999	0.8	3.3	3.7

¹ The change is the growth rate from one period to the next. The annualized change is the growth rate compounded annually. The year-over-year change is the growth rate of a given quarter compared with the same quarter of the previous year.

Growth in exports of goods and services slowed considerably in the second quarter to 0.4%—the weakest performance in two years. Sustaining the growth were exports of energy products, which climbed 9.6% following sizeable drops in the two prior quarters. A warm spring in the United States boosted demand for Canadian electricity to run air conditioners. As well, more coal was shipped to healthier Asian markets, and exports of crude oil partly recovered from a precipitous decline in the first quarter, growing nearly 10%. In the second quarter, the volume of energy exports grew robustly and prices climbed significantly.

The stellar growth of energy product exports was partly offset by a decline in exports of services, automotive products, and industrial goods and materials, particularly metals. In the case of services, the decline was largely attributable to lower travel spending by foreigners in Canada (-7.1%).

Consumer spending on goods and services in the second quarter grew a moderate 0.7%. The increase was concentrated in services, whereas consumer purchases of goods cooled after a strong first quarter. Meanwhile, federal transfer payments to the provinces climbed 20%, as provincial governments were given access to additional federal funds for health care.

Available on CANSIM: matrices 701-726, 728-735, 737-744, 748-750, 796, 797, 6520-6585 and 6597-6624.

The second quarter 1999 issue of *National economic and financial accounts, quarterly estimates* (13-001-XPB, \$44/\$145) presents the full report. For information about other products and services that are available on this subject, contact Client Services (613-951-3810, iea-crd@statcan.ca). For further analytical information, contact the Information Officer (613-951-3640), Income and Expenditure Accounts Division.

Current account deficit up slightly

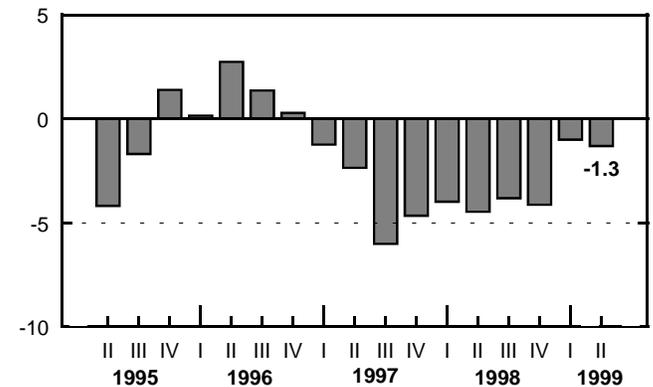
The deficit on current account transactions (seasonally adjusted) increased slightly in the second quarter to \$1.3 billion. This means that Canadian residents continued to spend more than they earned from abroad on goods, services, investment income and current transfers. The higher deficit was led by service transactions, notably for transportation and travel. The surplus on goods trading, which had been on an uptrend for the past year, was largely unchanged in the second quarter.

The services deficit rose \$0.3 billion to \$1.6 billion. That is similar to 1998 levels. Higher deficits in the transportation and travel accounts were partly offset by a lower deficit for commercial services. The higher transportation deficit occurred in air transportation, due to a small drop in fare receipts and an equal rise in payments. Visitor spending slipped by \$0.2 billion and the number of overnight foreign visitors declined in the quarter. At the same time, Canadians' outlays abroad remained at the level of the two prior quarters.

In the second quarter, the near-record profits of Canadian direct investors outpaced Canadian returns going to foreign direct investors. So the deficit on investment income narrowed by \$0.4 billion down to \$7.2 billion. Since 1993, this deficit has ranged between \$6 billion and \$9 billion.

Current account balance

\$ billions, seasonally adjusted



The surplus on goods was largely unchanged, edging down to \$7.3 billion. In the second quarter, Canadian traders had record export sales of \$86.9 billion, while imports rose to \$79.6 billion—second only to the final quarter of 1998. The growth in both exports and imports was modest, due to offsetting changes in the trade of major commodities. The energy sector, most forest products, communications equipment and trucks all made export

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... Current account deficit up slightly

gains. Moderate growth in the usual goods surplus with the United States largely offset record deficits with non-OECD countries and the European Union.

In the financial and capital account (not seasonally adjusted), Canadians resumed their purchases of foreign assets, albeit modestly, while reducing their liabilities to foreigners. Canadian companies continued to invest abroad, raising direct investment in the quarter to \$6.3 billion. Three-quarters of that was directed to the United States, where it was distributed widely by industry, led by the financial and insurance industry.

Although down slightly from the first quarter, Canadian demand for foreign stocks continued. More than two-thirds of the second quarter's \$3.5 billion investment went into overseas markets, a return to the pre-1998 pattern after five quarters of mainly U.S. acquisitions. Canadian investors tempered that by reducing their holdings of foreign bonds by \$1.5 billion, a switch from their significant bond purchases in both 1997 and 1998.

Canada's international reserve assets increased for a third consecutive quarter, but by an amount less than in the two prior quarters. Over the three quarters, the investment in reserve assets totalled \$10 billion. Two-thirds of that was invested in U.S. dollar-denominated securities and deposits. For a second consecutive quarter, the loonie rose against most foreign currencies. Against the American dollar, it closed the second quarter at 68.35 U.S. cents—its highest quarterly close in more than a year.

Foreign companies made a near-record direct investment in Canada of \$8.2 billion. In part, that was driven by acquisitions in the Canadian communications industry. Four-fifths of it originated in the United States and, for a second consecutive quarter, the investment went primarily into the "other industry" category, which includes communications and electrical and electronic products. Meanwhile, foreign portfolio investors added a substantial amount (\$12.1 billion) to their holdings of Canadian stocks and bonds. They continued to reduce their holdings of short-term paper (down \$3.9 billion), following a swing in the interest-rate differential in favour of investing in U.S. government paper.

Canada's financial institutions saw their deposit liabilities to foreigners fall in the second quarter by a record \$18.6 billion. This followed an \$8.3 billion drop in those liabilities in the first quarter. The second-quarter drop produced a substantial outflow from Canada of funds, which were almost exclusively denominated in foreign currencies. Two-thirds of the outflow reflected transactions between Canadian banks and their foreign affiliates, located for the most part in the United States.

Available on CANSIM: matrices 2325-2327, 2355, 2360-2377 and 3183.

The second quarter 1999 issue of Canada's balance of international payments (paper: 67-001-XPB, \$38/\$124; online at www.statcan.ca: 67-001-XIB, \$29/\$93) presents the full report. For further information, contact Patrick O'Hagan (613-951-1798), Balance of Payments and Financial Flows Division.

Manufacturers lead monthly GDP growth

In June, the economy advanced for an 11th consecutive month as gross domestic product (GDP) increased 0.3%. Strength was concentrated in manufacturing, construction, wholesale trade and business services. The output of forestry and mining declined, however, following substantive gains in the previous month. Also, GDP fell significantly in the non-business sector.

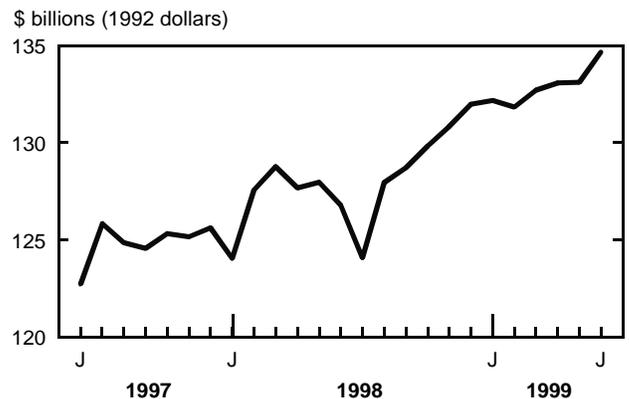
Manufacturing industries posted their strongest production gain so far this year (+0.8%), largely due to ongoing demand from the United States and higher sales to European countries. The leaders were auto parts, electrical and electronic products, primary and fabricated metals, and pharmaceuticals.

Auto parts manufacturers revved production in June a strong 3.3%. Vehicle production was virtually unchanged, however, as demand in the United States levelled off. Even so, output in this industry was up from a year earlier by 35.0%. The electrical and electronic products industries advanced 2.1%, led by makers of computers and peripherals (+5.0%). The production increase was largely a response to U.S. demand—exports of these products were up 14.7%. Elsewhere in this sector, greater economic activity occurred in telecommunications (+2.4%) and electrical equipment (+5.4%).

Manufacturing of primary metal products rose 1.6%. This was mostly due to a surge in primary steel production (+3.9%), which began to rebound from two successive sharp declines. Makers of fabricated metal products raised output 1.8%, led by machine shops and metal stamping industries. Pharmaceutical production jumped a healthy 3.4%. This growth followed two months of declines, so output was still below the March level.

Note to readers
 Monthly gross domestic product (GDP) by industry is valued at 1992 prices. The data are seasonally adjusted at annual rates.

Manufacturing industries' output



Elsewhere in the economy, homebuilders had their strongest month since January (+2.1%). The activity was particularly robust for builders of single-family detached dwellings. Non-residential builders also moved ahead (+1.0%). Wholesalers of computers had another strong month (+3.5%), as wholesaling activity overall rose 1.0%—extending the remarkable growth that

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... Manufacturers lead monthly GDP growth

has characterised the industry for two-and-a-half years. Meanwhile, retailers continued to inch forward in June (+0.2%). However, were it not for car and truck dealers, retail sales would have been down in the month. Furniture sellers also did well in June, as consumers continued to spend on big-ticket items for the home. Auto parts stores and service stations benefited from higher demand, too.

The other service industries generally made modest gains in June. The higher production of manufactured goods gave transportation a lift (+0.3%), especially trucking services (+1.1%). The communications industry's output edged higher in June after months of solid gains, leaving GDP in this industry up from a year earlier by 14.4%. Consumers continued to push demand for long distance and cellular phone services. A 0.8% rise in business services was led, as in most months during the past year, by computer services. This group continued to shine in June, posting a gain of 1.9%. Spurred by the Year 2000 challenge, production in this industry was 24% higher than a year earlier.

The mining industry got hammered again in June (-1.1%)—the ninth month of decline since June 1998. Weak metal prices

continued to exact their toll, while several recent mine closures hammered the industry. The weakness hit all metal types and all non-metal mining, including diamonds. The recovery in crude oil prices and the highest natural gas prices in more than a decade were not enough to lift the oil and gas industry in June (-2.0%). However, this decline followed strong gains in April and May. The one bright spot in mining was drilling and rigging (+27.0%).

Also notable, the electric power industry got a boost from warmer-than-average temperatures in eastern Canada, boosting demand for air conditioning. In June, Ontario Hydro reported a new record for peak daily demand for electric power. The active housing market continued to stimulate demand for the services of real estate agents (+1.3%). Output of the forestry sector fell 3.8%.

Available on CANSIM: matrices 4677-4681.

The June 1999 issue of **Gross domestic product by industry (15-001-XPB, \$15/\$145)** presents the full report. To purchase data, contact Kim Lauzon (1 800 877-IMAD; IMAD@statcan.ca). For further analytical information, contact Richard Evans (613-951-9145; evanric@statcan.ca), *Industry Measures and Analysis Division*.

Consumers flock to department stores

In July, consumers flocked to department stores and opened their wallets. As a result, department stores reported sales of \$1,543.0 million. That was an increase from June of 3.1% and the largest increase since January (+4.7%). (Unless otherwise indicated, all data are seasonally adjusted.)

Department store sales this July were higher than in July 1998 by 8.8%. Moreover, the yearly sales growth rates for June (+10.7%) and July (+8.8%) were the highest since April 1998 (+10.8%).

Except for a pause in the first half of 1998, department store sales have been advancing strongly since early 1996. Despite a decline in the number of department stores in the spring and summer of 1998, the average sales of the remaining stores have risen.

Unadjusted for seasonal factors, department store sales were up from July 1998 at the national level by 12.1%. Unadjusted yearly sales climbed significantly in all provinces. The greatest increase was for the grouping of Newfoundland and Prince Edward Island (+23.3%). In the region of British Columbia, the Yukon, the Northwest Territories and Nunavut, sales grew only 7.5%. Still, it was the region's highest yearly growth rate for department store sales since December 1997 (+11.2%). Since the start of 1998, this region has generally shown the lowest yearly growth rates for department store sales.

Available on CANSIM: matrices 111-113.

Accounts receivable data for department stores are also now available. To purchase data, or for general information, contact Client Services (613-951-3549, 1 877 421-3067, retailinfo@statcan.ca). For analytical information, contact Clérance Kimanyi (613-951-359, kimacl@statcan.ca), *Distributive Trades Division*.

Department store sales including concessions

Not seasonally adjusted

	July 1999	July 1998 to July 1999	January-July 1999	January-July 1998 to January-July 1999
	\$ millions	% change	\$ millions	% change
Canada	1,383.2	12.1	8,787.0	6.6
Newfoundland and Prince Edward Island ¹	28.4	23.2	162.6	11.2
Nova Scotia	42.8	13.0	265.4	7.8
New Brunswick	31.0	11.1	190.1	4.3
Quebec	257.2	12.0	1,647.3	6.7
Ontario	584.8	14.3	3,751.7	8.1
Manitoba	57.2	8.7	366.4	5.7
Saskatchewan	46.3	8.0	292.8	6.5
Alberta	161.3	10.4	1,023.1	6.2
British Columbia, Yukon, Northwest Territories and Nunavut ¹	174.3	7.5	1,087.5	1.6

¹ For reasons of confidentiality, the data for Newfoundland and Prince Edward Island are combined, as are the data for British Columbia, the Yukon, the Northwest Territories and Nunavut.

International travel deficit more than doubles

The deficit in the international travel account more than doubled in the second quarter, rising from \$160 million in the first quarter to \$392 million. Mostly, this was due to a higher travel deficit between Canada and the United States. Despite the rise, the second quarter deficit was still well below the most recent deficit peak of \$961 million in the third quarter of 1997.

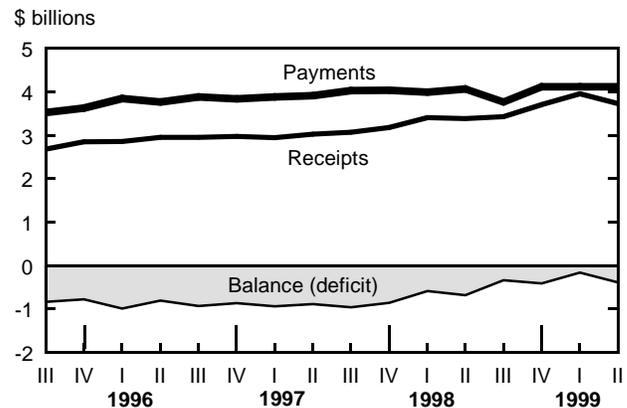
In the second quarter, Canadians spent more travelling outside the country than they did in the first quarter (+0.1% to \$4.1 billion). Meanwhile, foreigners travelling in Canada spent less (-5.7% to \$3.7 billion). Canadians travelling south of the border boosted their spending (+3.5% to \$2.6 billion) at the same time that Americans travelling north of the border spent less (-3.3% to \$2.4 billion). The result was a much higher travel deficit with the United States (\$216 million)—a deterioration from the first quarter (\$47 million) and back to the level set in the fourth quarter of 1998. A factor that likely contributed to that deterioration was the appreciation of the loonie against the American dollar during the second quarter (+3.0% from 66 to 68 U.S. cents). Along with their spending, Canadians increased their trips to the United States in the quarter (+1.7%).

As for overseas countries, Canadians spent more money travelling in overseas countries in the second quarter (\$1.5 billion) than travellers from those countries spent in Canada (\$1.4 billion). The resulting travel deficit (\$176 million) was higher than in the first quarter (\$113 million). In the second quarter, spending by overseas travellers dropped 9.7%, returning to the level seen in the fourth quarter of last year, while Canadian spending overseas fell 5.1%. That overall spending decrease might have been due to the fact that the number of trips made between Canada and overseas destinations declined. In the second quarter, overseas residents made fewer trips to Canada than they did in the first quarter (-3.7% to 1.1 million trips), while Canadians travelled less to overseas destinations (-1.4% to 1.1 million trips).

Note to readers

This analysis is based on seasonally adjusted data unless otherwise stated. Receipts represent spending by foreigners travelling in Canada. Payments represent spending by Canadians travelling outside Canada. Both receipts and payments include education-related and medical-related expenditures. All amounts are in Canadian dollars and are not adjusted for inflation. Overseas countries are countries other than the United States.

International travel account



To order data, contact Carol Moskaluk (613-951-9169, fax: 613-951-2909, moskcar@statcan.ca). For further analytical information, contact Johanne Plante (613-951-1910, fax: 613-951-2909, planjoh@statcan.ca), International Travel Section.

Tourism from overseas recovers

buoyed by the ongoing strength of American tourism and by the recovery of tourism from overseas countries, international tourists made 2.6 million overnight trips to Canada in the first quarter of 1999, an increase from the year-earlier quarter of 10.9%. That was also the highest number of such trips for a first quarter in the 26 years that these travel data have been collected.

In particular, visitors from countries other than the United States made 543,000 trips to Canada, up a hefty 9.4%. This growth followed six quarters of decline. However, most of the quarter's international visitors—about 2.0 million—came from the United States (+11.3%). That was the highest first-quarter volume of American tourists ever recorded. The booming U.S. economy, the strong confidence of American consumers and the cheaper Canadian dollar continued to be the key factors underpinning the growth in American tourism to Canada.

The first quarter's rise in tourism from the United States benefited almost all regions of Canada. British Columbia recorded the largest gain in American visitors (+25.5%), followed by

Quebec (+20.3). In the first quarter, the American visitors who stayed overnight injected almost \$900 million into the Canadian economy (+24.4% from first quarter of 1998) and they spent about \$445 per trip (+11.7%). American travellers took more flights to Canada in the first quarter (+15.8%), maintaining the trend that began with the implementation of the Open Skies Agreement in February 1995. Compared with the first quarter of 1998, Americans also made more automobile trips to Canada (+8.8%).

Visitors from overseas countries spent \$638 million travelling in Canada in the first quarter, 17.3% more than they spent in the same quarter of 1998. Asian travel to Canada rose a modest 3.9%, the first positive movement in Asian traffic since the winter of 1997. Overnight trips from Europe expanded 9.7%. Most of that gain originated from Canada's traditional tourism markets (the United Kingdom, France and Germany).

Canadians, meanwhile, made 2.9 million overnight trips to the United States, down from the first quarter of 1998 by 5.2%. It was also the lowest quarterly level since 1988 and the 10th consecutive quarterly decline in Canadian traffic south of the

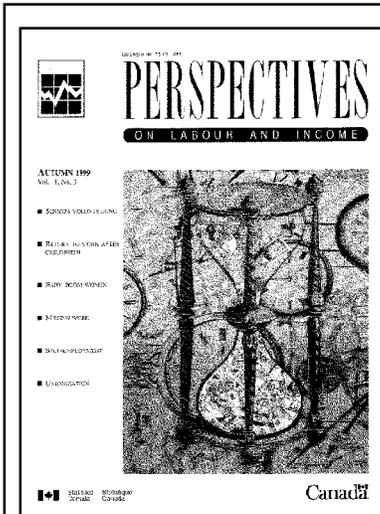
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... Tourism from overseas recovers

border. By contrast, Canadians made a record 1.5 million trips overseas in the first quarter (+4.7%), continuing the growth trend in overseas outbound travel. In the first quarter, sunny destinations were particularly popular with Canadians, especially islands in the Caribbean, which saw a 16.8% jump in Canadian winter traffic.

To order data from the International Travel Survey, contact Carol Moskaluk (613-951-9169, fax: 613-951-2909, moskcar@statcan.ca). For further analytical information, contact Laurie McDougall (613-951-6766, fax: 613-951-2909, mcdolau@statcan.ca), International Travel Section, Culture, Tourism and the Centre for Education Statistics.

New from Statistics Canada



Perspectives on labour and income Autumn 1999

The feature article in the Autumn issue of *Perspectives on labour and income*, "Employment after childbirth," examines the return-to-work patterns of women who gave birth in 1993 or 1994. This article analyses the characteristics of both those women who returned and those who did not, as well as a number of job, personal and family characteristics.

This *Perspectives* also contains articles on how and why seniors volunteer, and the services they provide; baby boom women in the labour force, their activity and success in both 1977 and 1997 compared with preceding and succeeding generations; work absence rates in 1998 and industry differences; self-employment in Canada and the United States; and, an update on unionization.

The Autumn 1999 issue of *Perspectives on labour and income* (75-001-XPE, \$18/\$58) is now available. For further information, contact Henry Pold (613-951-4608, poldhen@statcan.ca), or Fiona Long (613-951-4628, longfio@statcan.ca), Labour and Household Surveys Analysis Division.

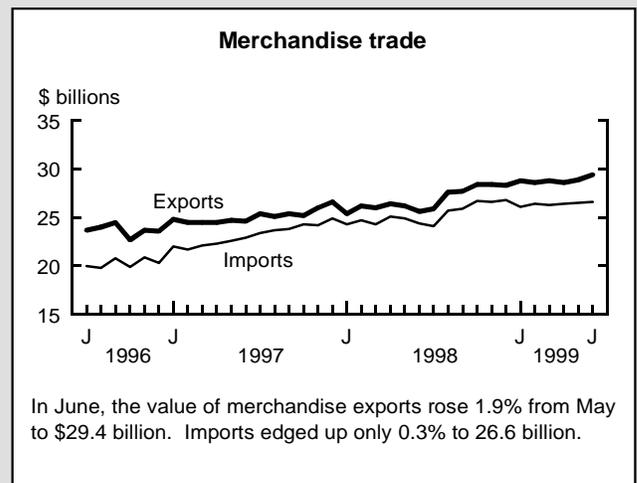
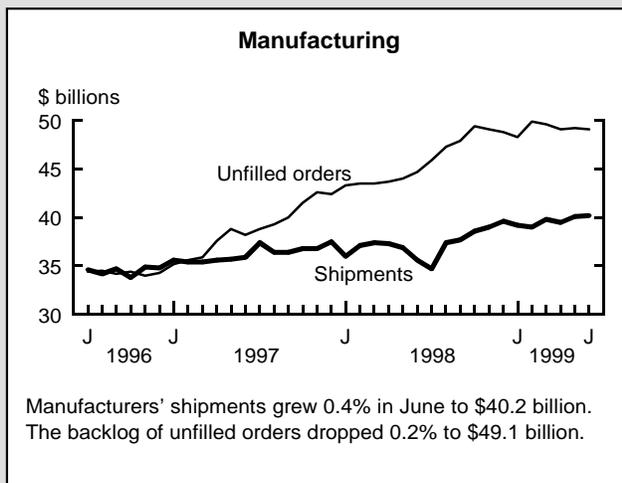
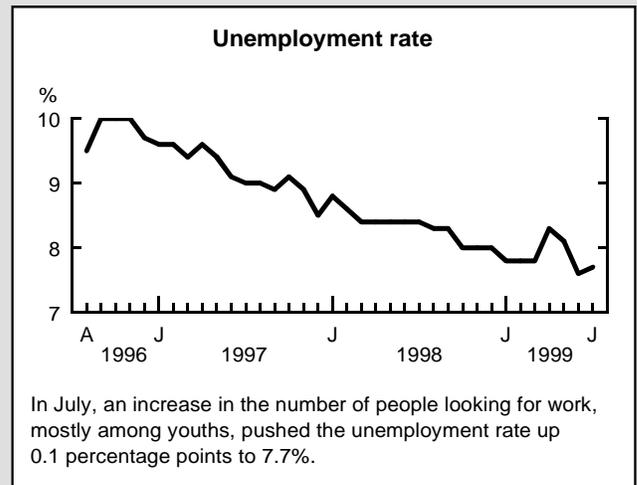
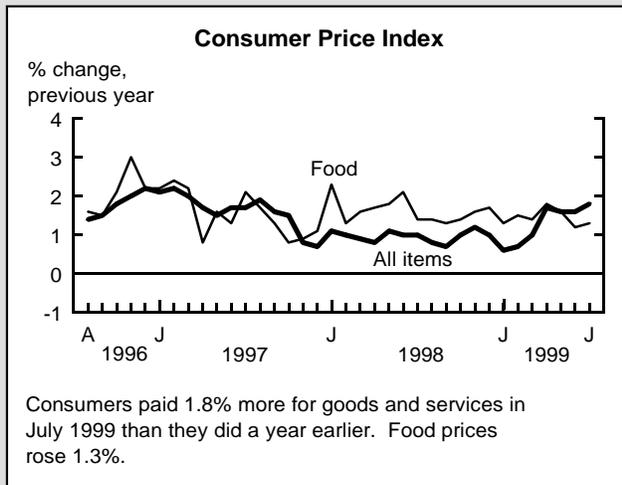
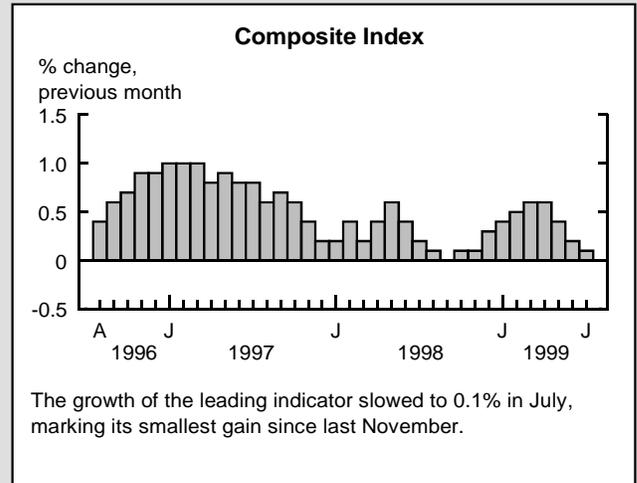
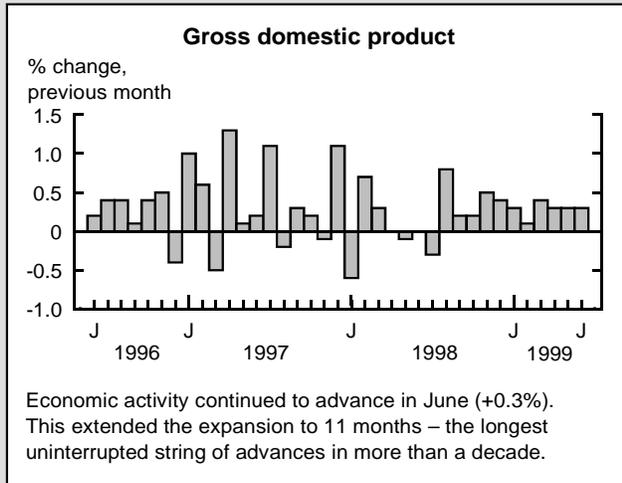
A statistical profile of Canadian communities (enhanced version)

A *statistical profile of Canadian communities* is one of the most popular components of Statistics Canada's Web site. At no charge, researchers, students and anyone else who is interested can access a wealth of statistical information for about 6,000 Canadian cities, towns, villages, and aboriginal communities. The site's simple mapping feature enables users to pinpoint the communities that interest them. Information is then displayed for those communities on four major topics: population, education, income and work, and families and dwellings.

Now, the enhanced version adds another topic to that list: health. Under this display, users will find the number of births and deaths that occurred in 1996 for every community. Data will now also be available for large and not-so-large metropolitan areas (census metropolitan areas and census agglomerations). From a search results screen, users will now also be able to access a list of municipalities contained within the metropolitan area and find data on the particular municipality of interest.

To try out the new enhanced version of *A statistical profile of Canadian communities*, visit the Statistics Canada Web site at www.statcan.ca, then click either "Census, education resources" or "Canadian statistics". For further information, contact your nearest Statistics Canada Regional Reference Centre.

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)	June	741.2	0.3%	3.6%
Composite Index (1981=100)	July	215.0	0.1%	3.8%
Operating profits of enterprises (\$ billion)	Q1 1999	36.3	4.7%	..
Capacity utilization (%)	Q1 1999	83.1	0.5†	- 0.3†
DOMESTIC DEMAND				
Retail trade (\$ billion)	June	21.4	0.3%	5.2%
New motor vehicle sales (thousand of units)	June	125.0	0.6%	1.8%
Wholesale trade (\$ billion)	June	29.8	0.0%	7.7%
LABOUR				
Employment (millions)	July	14.68	0.3%	2.7%
Unemployment rate (%)	July	7.7	0.1†	- 0.7†
Participation rate (%)	July	65.4	0.1†	0.4†
Average weekly earnings (\$)	June	609.89	0.1%	0.7%
Help-wanted Index (1996=100)	August*	158	- 1.3%	9.9%
INTERNATIONAL TRADE				
Merchandise exports (\$ billion)	June	29.4	1.9%	14.9%
Merchandise imports (\$ billion)	June	26.6	0.3%	9.0%
Merchandise trade balance (all figures in \$ billion)	June	2.8	0.4	1.6
MANUFACTURING				
Shipments (\$ billion)	June	40.3	0.4%	13.1%
New orders (\$ billion)	June	40.1	- 0.1%	10.4%
Unfilled orders (\$ billion)	June	49.1	- 0.2%	9.8%
Inventory/shipments ratio	June	1.26	0.00	- 0.12
PRICES				
Consumer Price Index (1992=100)	July	110.8	0.3%	1.8%
Industrial Product Price Index (1992=100)	July	122.1	1.2%	2.2%
Raw Materials Price Index (1992=100)	July	118.1	4.6%	10.0%
New Housing Price Index (1992=100)	June	100.6	0.0%	0.5%

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

* new this week

† percentage point

.. figures not available yet due to a survey redesign

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A weekly review

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Publications released from September 2 to 8, 1999

Division/Title of publication	Period	Catalogue number	Price: Issue/Subscription	
			Canada (C\$)	Outside Canada (US\$)
AGRICULTURE				
Cereals and oilseeds review	June 1999	22-007-XPB	15/149	15/149
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