



# Infomat

## A Weekly Review

Friday, October 1, 1999

### OVERVIEW

◆ **Forest products push trade surplus up**

In July, strong forest product exports helped to push the merchandise trade surplus up by more than \$400 million to \$3.2 billion—its highest level since December 1996.

◆ **Composite index maintains growth**

The growth of the composite index was little changed in August at 0.2%, maintaining its average gain since June. Once again, housing and the stock market led the advance, while services and other durables lagged behind.

◆ **Higher gasoline prices lift retail sales**

Retail sales rose for a third consecutive month in July (+1.3%). About a third of July's increase resulted from higher gasoline prices. Most retail trade groups increased their sales in July.

◆ **Wholesale sales rise**

In July, wholesale sales rose 0.4%. Just two trade groups spurred the advance: computers, packaged software and other electronic machinery, and motor vehicles, parts and accessories.

◆ **Large retailers' major product lines showing strong sales growth**

In July, large retailers' sales reached \$6.0 billion, an increase from July 1998 of 7.6%. Most of their major product lines showed strong sales growth.

◆ **Merger fuels Canadian investment in foreign stocks**

In July, Canadian investors made a major \$5.1 billion investment in foreign stocks, mainly those denominated in the U.S. dollar. A merger of a Canadian company with an American firm fueled three-quarters of that activity.

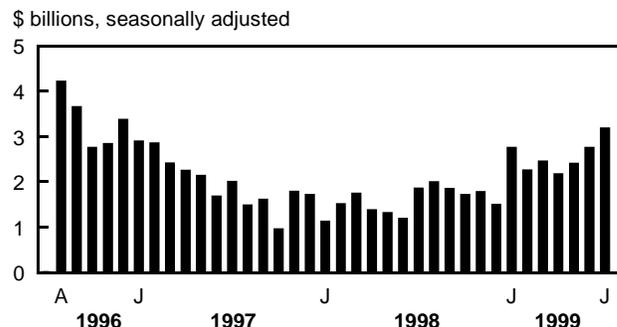
### Forest products push trade surplus up

In July, strong forest product exports increased the trade surplus in the forest products industry, pushing the total merchandise trade surplus up by more than \$400 million from a revised \$2.7 billion in June to \$3.2 billion. Exports passed the \$30 billion mark in July (+1.8%) for the first time ever. The upward trend of exports continued primarily because of strong activity in the lumber, natural gas and crude oil industries, but that was dampened by a steep drop in car exports. Imports edged higher for a sixth consecutive month (+0.3%) to a robust \$26.9 billion. That was 11.5% above the July 1998 level, chiefly due to marked increases in imports of cars (+49.2% on buoyant domestic sales) and auto parts (+38.1% on increased production capacity).

July was the first month since July 1996 that forest products was the main contributor to the monthly increase in exports. Lumber showed the strongest export growth, with the increase resulting from both higher prices and larger volumes. Strong construction activity in the United States reduced Canadian lumber inventories, pushing prices up in July by 8.9%. In addition, some producers had postponed their lumber exports until July, the beginning of the second quarter for quotas.

Energy exports rose markedly, mainly because of higher exports of electricity, natural gas and crude oil to the United States. The

#### Merchandise trade balance



(continued on page 2)



### ... Forest products push trade surplus up

strong demand for natural gas in the United States to produce electricity for air conditioning reduced U.S. inventories, as did an explosion at a California refinery. This put additional pressure on already rising energy prices. A strong rise in exports of computer and controlling equipment pushed the machinery and equipment sector upward in July. Aircraft exports declined slightly but, at more than \$1 billion, they remained very high.

A sharp drop in canola and seafood exports was completely offset by strong exports of wheat and barley. Exports of Canadian slaughter animals declined 13.0%. The U.S. Customs duties imposed on Canadian slaughter animals seem to have had an impact. (July was the first month in which duties were applied.)

The automotive products sector dropped sharply in July, partly as a result of a \$180 million decrease in car exports. However, at more than \$7.6 billion, automotive exports were more than 50% higher than in July 1998 because some plants increased production capacity and overtime to meet demand.

On the import side, automotive product imports rose for a third consecutive month. Imports of cars and auto parts made the strongest gains. After three monthly declines, industrial goods imports were pushed higher by organic and plastic products, as well as by automakers' demand for basic metal products. Three months of increases were followed by a decline in July for machinery and equipment imports. Imports of planes declined, as did automakers' imports of assembly-line and metal-working machinery. In addition, office equipment imports (especially processors, printers, scanners and laptops) fell.

**Available on CANSIM: matrices 3618, 3619, 3651, 3685-3699, 3701-3711, 3713, 3720, 3887-3913, 8430-8435 and 8438-8447.**

*The July 1999 issue of Canadian international merchandise trade (paper: 65-001-XPB, \$19/\$188; Internet: 65-001-XIB, \$14/\$141) includes tables by commodity and country. Current account data are available quarterly in Canada's balance of international payments (67-001-XPB, \$38/\$124). For further information, contact Jocelyne Elibani (613-951-9647 or 1-800-294-5583), International Trade Division. See also "Current trends" on page 7.*

## Composite index maintains growth

The growth of the composite index was little changed in August at 0.2%, maintaining its average gain since June. The sectors showing strength and weakness were also little changed: housing and the stock market led the advance, while services and other durables lagged behind.

The housing index continued to rise, but the 0.7% gain was the slowest since last winter. Groundbreaking for new homes leveled off. Sales of existing homes were brisk enough to support solid

growth in the demand for furniture and appliances. Demand for other durable goods was not so strong. Flat retail sales helped to slow demand for manufactured goods. However, the auto sector should get a large boost from the inventory buildup that is occurring as a hedge against possible strikes this fall. Notably, services employment continued to weaken in both the personal and the business sector.

**Available on CANSIM: matrix 191.**

*The September 1999 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.*

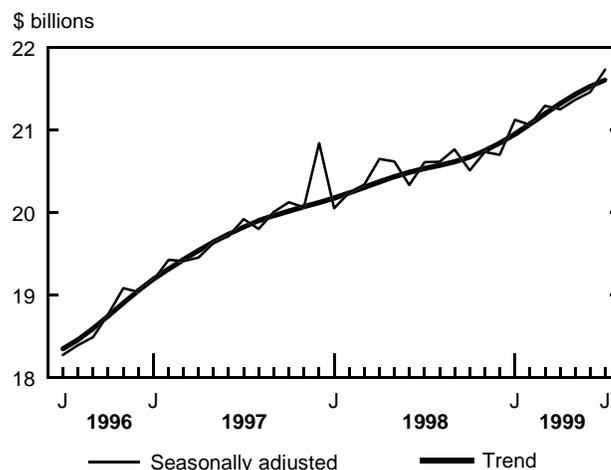
## Higher gasoline prices lift retail sales

Retail sales rose for a third consecutive month in July (+1.3% to \$21.7 billion). About a third of July's sales increase resulted from higher gasoline prices, since little or no change in prices was seen elsewhere in retailing. Excluding the effect of prices, retail sales increased in July by 0.9%. Retailers have been seeing strong sales since last October (+6.0% over the period), and July's increase was twice the average monthly gain observed since then.

Most retail trade groups increased their sales in July. The leaders were clothing stores (+3.1%), general merchandise stores (+2.1%) and stores in the automotive group (+2.0%). Sales were up at gasoline service stations by 1.8%; however, excluding the price effect, they were down 1.3%. The only sales decline was seen in furniture stores (-0.3% after a spending spree in May and June), while sales in food stores remained unchanged.

After staying away in June (-2.9%), consumers spent more in all types of clothing stores in July. In fact, the sales increase was

Retail sales



(continued on page 3)

### ... Higher gasoline prices lift retail sales

the largest in 12 months. In 1999, clothing stores have seen their sales grow considerably: July's sales were 5.6% higher than in December 1998. Most of the recent strength is coming from the "other" clothing retailers, which include unisex and family clothing stores.

The general merchandise trade group was led by strong sales at department stores (+3.7%). After experiencing weak sales during most of 1998, retailers in the general merchandise sector have performed well this year. In July, their sales were up from December 1998 by 7.0%.

#### Retail and wholesale trade, July 1999

Seasonally adjusted

	Retail sales		Wholesale sales	
	\$ millions	% change, previous month	\$ millions	% change, previous month
<b>Canada</b>	<b>21,736</b>	<b>1.3</b>	<b>30,167</b>	<b>0.4</b>
Newfoundland	342	-1.5	229	1.5
Prince Edward Island	98	-1.0	48	-0.7
Nova Scotia	664	-3.6	572	-2.6
New Brunswick	541	1.1	363	-0.6
Quebec	5,012	1.3	6,063	-0.5
Ontario	8,385	1.8	15,114	1.3
Manitoba	744	0.8	947	0.1
Saskatchewan	640	0.8	897	-1.8
Alberta	2,432	2.0	2,660	-0.6
British Columbia	2,805	1.0	3,251	0.5
Yukon	27	-1.6	9	-4.3
Northwest Territories	32	5.2	12	-1.8
Nunavut	14	-5.8	2	12.4

Automotive retailers have been in high gear since last fall. And July was no exception thanks to higher sales by motor and recreational vehicle dealers (+3.0%) and gasoline service stations (+1.8%). However, after four straight months of gains, stores selling auto parts, accessories and services showed a decline of 2.1%. The return of higher gas prices in July (+4.1%), after a temporary decline in June (-1.5%), pushed sales of gasoline service stations up to their highest level since January 1997. As of July, retail gas prices had jumped 16.6% from their low in February 1999.

Retail sales advanced in July in most of the provinces. In each of the Prairie provinces, retailers enjoyed higher sales in both June and July. However, sales there have still shown only little growth since the end of 1997. In Ontario, retail sales have risen every month so far this year to stand above last December by 7.8%. Sales in Ontario have generally been growing since mid-1996. In Quebec, July's higher retail sales completely offset the decline in June (-0.8%). Sales in Quebec have remained unchanged since the start of the year, after advancing in the second half of last year. Previously, retailers in Quebec experienced volatile sales in the first half of 1998 and flat sales for most of 1997. In British Columbia, sales have been advancing since last fall, recapturing most of the decline that occurred earlier last year. Prior to 1998, sales in British Columbia had been on the rise since the end of 1995.

*Available on CANSIM: matrices 2299 and 2397-2416 and 2418-2420.*

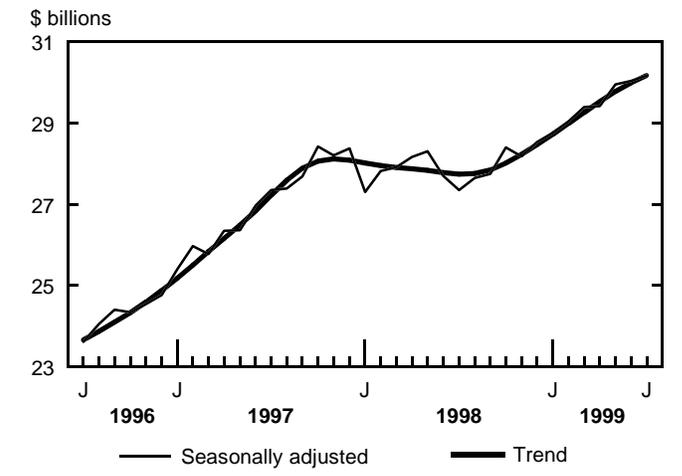
*The July 1999 issue of Retail trade (paper: 63-005-XPB, \$21/\$206; Internet at www.statcan.ca: 63-005-XIB, \$16/\$155) presents the full report. To order data, or for general information, contact Client Services (1 877 421-3067 or 613-951-3549, retailinfo@statcan.ca). For further analytical information, contact Paul Gratton (613-951-3541, gratpau@statcan.ca), Distributive Trades Division.*

## Wholesale sales rise

In July, wholesale sales rose 0.4% to \$30.2 billion. Just two trade groups spurred the advance: computers, packaged software and other electronic machinery (+4.6%) and motor vehicles, parts and accessories (+2.7%). If not for their strong showing, wholesale sales would have fallen 0.7%, since the only other gains from June were reported in industrial and other machinery, equipment and supplies (+0.9%) and in household goods (+0.5%). Sales of lumber and building materials remained unchanged. Noteworthy declines were reported in apparel and dry goods (-4.4%) and in farm machinery, equipment and supplies (-3.7%). Sales in this last group have declined in five of the past six months.

Aside from a brief pause in early 1998, sales of computers, packaged software and other electronic machinery have been generally climbing for the last few years. Ongoing strong demand for computers and software is fuelling that climb in sales, as is Canadians' demand for Internet access. Wholesalers also reported robust sales in July of wireless communications devices (cell phones and electronic security products).

#### Wholesale sales



(continued on page 4)

### ... Quebec and Ontario manufacturers behind employment

Although July is usually a slower month for wholesale sales of motor vehicles, parts and accessories, sales this July were higher than in past years. Canadian demand for imported vehicles was also strong in July. Sales of motor vehicles, parts and accessories have been generally rising since the fall of 1998.

Newfoundland's wholesalers continued to report large contracts in July. Sales have been climbing every month in Newfoundland for a full year. Despite July's decline in Saskatchewan and the overall gloomy agricultural scene on the Prairies, wholesalers in Saskatchewan have been able to make small sales gains since the start of this year. But they have not recaptured all of 1998's losses.

Wholesalers' inventories increased in July by 0.8% to \$41.3 billion. Inventory values have started to rise following a brief decline at the start of the year. The inventories-to-sales ratio rose from 1.36 in June to 1.37. However, the ratio has been generally on the decline since mid-1998.

**Available on CANSIM: matrices 59, 61 and 648-649.**

*The July 1999 issue of Wholesale trade (63-008-XIB, \$14/\$140) can be downloaded from the Internet at [www.statcan.ca](http://www.statcan.ca). For general enquiries, or to order data, contact Client Services (1 877 421-3067 or 613-951-3549; [wholesaleinfo@statcan.ca](mailto:wholesaleinfo@statcan.ca)). For further analytical information, contact Alexander Hays (613-951-3552; [haysale@statcan.ca](mailto:haysale@statcan.ca)), Distributive Trades Division.*

## Large retailers' major product lines showing strong sales growth

In July, large retailers' sales reached \$6.0 billion, an increase from July 1998 of 7.6%. By comparison, total retail sales excluding vehicle dealers (motor and recreational) rose 5.7%. Most of the large retailers' major product lines showed strong sales growth. The largest gains were recorded by health and personal care products, home furnishings and electronics, and hardware, lawn and garden products. For the latter group of products, it was the third consecutive month of healthy increase. Together, sales of these three product lines accounted for 25% (\$1.5 billion) of the large retailers total sales in July.

### Large retailers' sales

Not seasonally adjusted

	July 1998	July 1999	July 1998 to July 1999
	\$ billions		% change
<b>All commodities</b>	<b>5,607</b>	<b>6,036</b>	<b>7.6</b>
Food and beverages	2,097	2,188	4.4
Clothing, footwear and accessories	1,012	1,098	8.5
Home furnishings and electronics	735	822	11.8
Health and personal care products	386	443	14.7
Housewares	270	290	7.4
Sporting and leisure goods	264	289	9.7
Hardware, lawn and garden products	240	265	10.7
All other goods and services	602	639	6.0

### Note to readers

*These data have not been adjusted for seasonal factors (changes due to differences in the number or significance of shopping days in each month). For example, the number of Saturdays (normally a busy shopping day) may differ from month to month or from year to year. July had five Saturdays this year; last year, it had four.*

The home furnishings and electronics product line recorded its highest yearly sales increase (+11.8%) since mid-1998. The leaders within this line were telephone and home office electronics (+19.6%), major appliances (+18.1%), household furniture, excluding mattresses and nursery equipment (+16.5%) and computers and related equipment (+16.3%). Moderate sales increases in July were recorded for small electrical appliances (+6.9%) and for televisions and audio/visual equipment (+5.5%). For the large retailers, the market share of home furnishings and electronics has climbed steadily from 12.8% in July 1997 to 13.1% in July 1998 to 13.6% this July.

Sales of health and personal care products represent a relatively small but growing portion of total sales for the large retailers. The large retailers' market share of these products grew from 6.9% in July 1998 to 7.3% this July. Most of this growth is attributable to sales of prescription and over-the-counter drugs (+23.0%).

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

## Merger fuels Canadian investment in foreign stocks

Canadians increased their holdings of foreign stocks by \$5.1 billion in July. Some three-quarters of this activity was in U.S. dollars as Canadian investors exchanged their shares in a Canadian company for shares in an American firm after the two merged. The remaining \$1.2 billion represented purchases of existing shares on the secondary market, mostly stocks from overseas countries. In the bond market, meanwhile, Canadian investors were net sellers. In July, they reduced their holdings of foreign bonds by \$1 billion, continuing a trend away from these securities in 1999 and bringing the reduction this year to \$2.5 billion.

For their part, foreigners increased their holdings of Canadian bonds in July by \$2.4 billion, as demand strengthened for federal bonds in the secondary market. This demand arose mainly from American and European investors, as the Canadian dollar lost ground against most major foreign currencies in July.

Foreign investors were also net buyers of Canadian stocks in July (\$1.3 billion), for a total investment in the first seven months

### Note to readers

*In July, the interest-rate differential on short-term government instruments shifted back to favouring investment in Canada by a small amount. For two months, the differential had favoured investment in the United States by up to a quarter of a percentage point. On long-term government instruments, however, the differential continued to favour investment in the United States, as it increased marginally to the range of 35-40 basis points.*

*Stock prices in July declined in the United States, whereas Canadian stock prices (TSE 300 composite index) added a further 1.0% to their 2.5% gain in June. So far in 1999 (July), Canadian stocks have outperformed their U.S. counterparts (Standard & Poor's 500 index) by advancing 9.2% compared with 8.1%.*

*The Canadian dollar lost two full cents in July against the U.S. dollar, erasing the entire gain of the previous three months. The loonie closed July at 66.39 U.S. cents.*

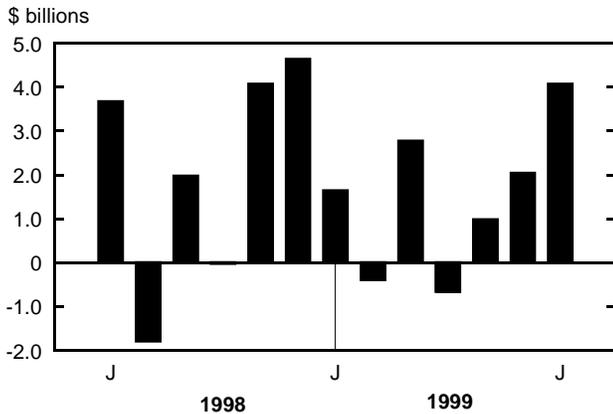
of 1999 of \$7.6 billion. The major portion of this buying was done by Americans. However, for the first time this year, European investors made a sizable acquisition of Canadian stocks. The strong demand for Canadian corporate shares occurred against a backdrop of rising Canadian stock prices.

In the money markets in July, foreigners (mainly American and Asian investors) cut their holdings of Canadian paper by a further \$1.4 billion, bringing their year-to-date divestment to more than \$9 billion. July's divestment was exclusively due to a reduced supply of Canada bills (federal government paper denominated in U.S. dollars).

**Available on CANSIM: matrices 2328-2330, 2378-2380 and 4195.**

*The July 1999 issue of Canada's international transactions in securities (paper: 67-002-XPB, \$18/\$176; online at [www.statcan.ca](http://www.statcan.ca): 67-002-XIB, 14/132) presents the full report. For further information, contact Don Granger (613-951-1864), Balance of Payments and Financial Flows Division.*

### Canadian investment in foreign stocks and bonds



## New from Statistics Canada



### Canadian economic observer September 1999

The September issue of Statistics Canada's flagship publication for economic statistics, *Canadian economic observer*, analyses current economic conditions, summarizes the major economic events that occurred in August and features a report on productivity growth in Canada and the United States.

A separate statistical summary contains a wide range of tables and charts on the principal economic indicators for Canada, the provinces and the major industrial nations.

*The September 1999 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.*

### Pension plans in Canada January 1, 1998

Data on employer pension plans (registered pension plans), their membership and plan provisions are now available from the Pension Plans in Canada database. The Pension Plans in Canada Survey is a census of all the registered pension plans in the country. Statistics are derived largely from administrative data provided by the 10 pension supervisory authorities.

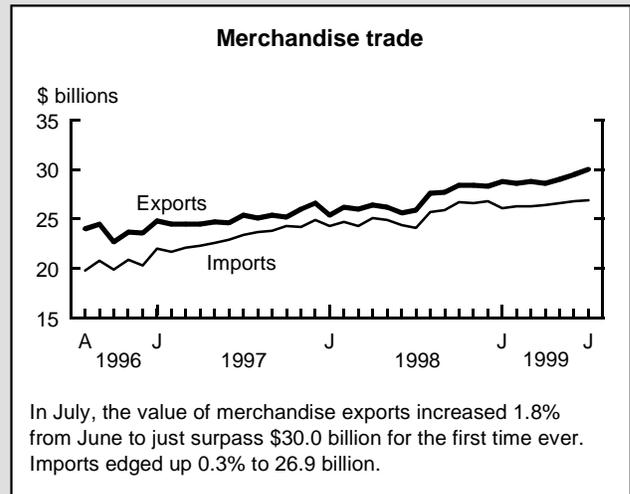
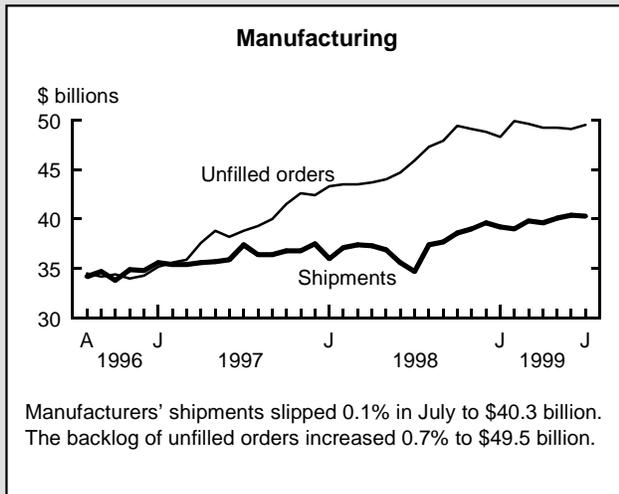
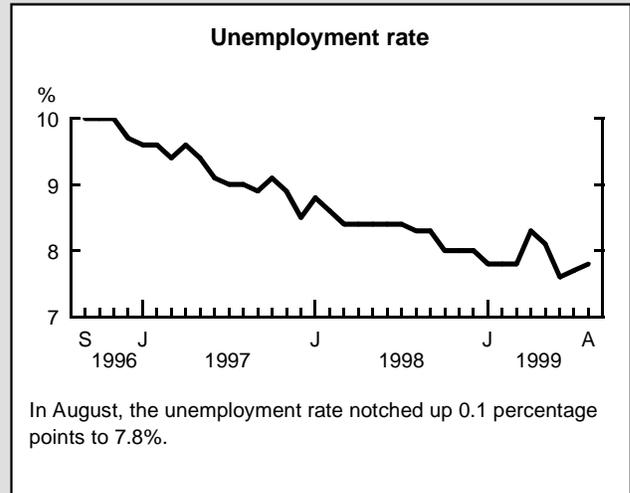
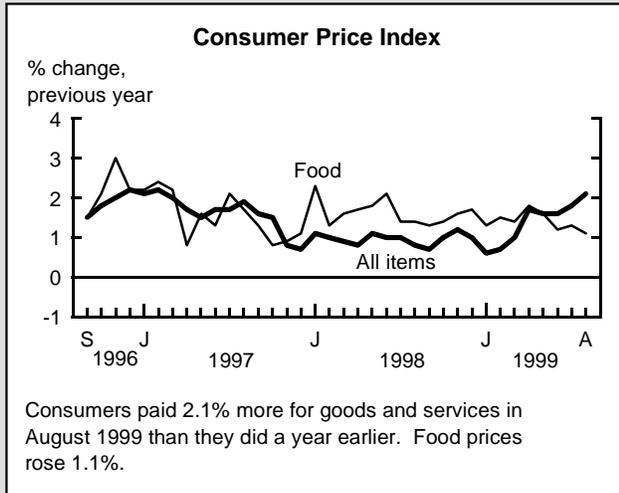
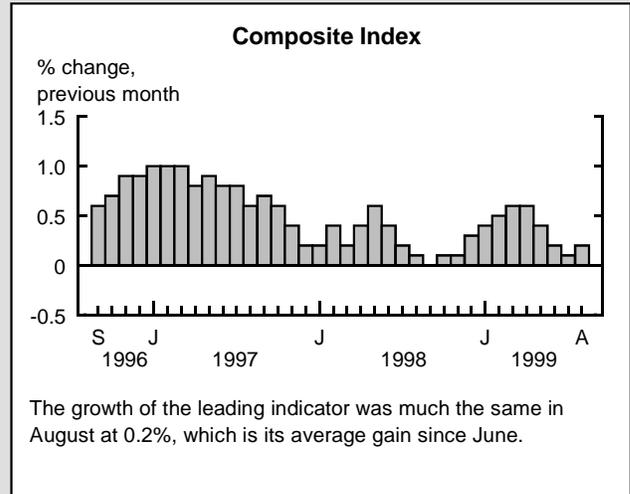
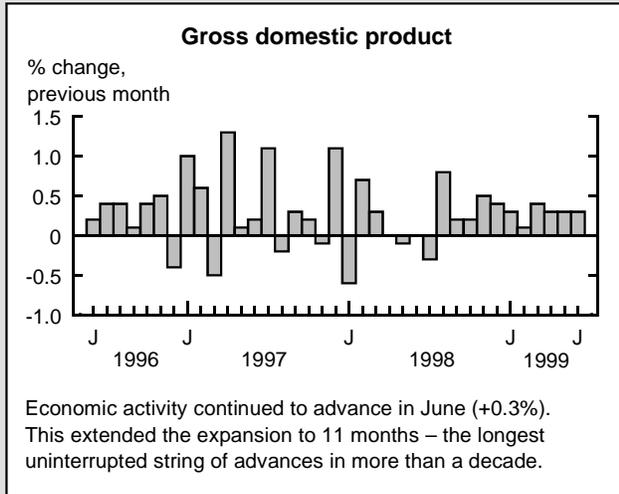
*The report Pension plans in Canada (74-401-XPB, \$41) will be available shortly. To order statistical tables of key information, custom tabulations, or for further information, contact Client Services (613-951-7355 or 1 888 297-7355, fax: 613-951-3012, income@statcan.ca), Income Statistics Division.*

### Travel agencies and tour operators in Canada 1997

This new report, *Travel agencies and tour operators in Canada*, strengthens the supply-side knowledge of the travel industry by providing an overview of the size, the financial position and the trends affecting the travel-agency and tour-operating industries. This report, which was a collaborative effort of the Canadian Tourism Commission and Statistics Canada, is a valuable resource for policy makers and researchers. It will also help those involved in the tourism industry to make effective business decisions.

*To order a copy of Travel agencies and tour operators in Canada (no charge), contact Denisa Georgescu (613-946-2136, georgescu.denisa@ic.gc.ca), Canadian Tourism Commission. For further analytical information, contact Adib Farhat (613-951-6306; farhadi@statcan.ca), Services Division, Statistics Canada.*

## Current trends



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

## Latest statistics

	Period	Level	Change, previous period	Change, previous year
<b>GENERAL</b>				
Gross domestic product (\$ billion, 1992)	June	741.2	0.3%	3.6%
Composite Index (1981=100)	August	215.7	0.2%	3.8%
Operating profits of enterprises (\$ billion)	Q2 1999	37.2	1.6%	..
Capacity utilization (%)	Q2 1999	83.8	0.5†	1.0†
<b>DOMESTIC DEMAND</b>				
Retail trade (\$ billion)	July	21.7	1.3%	5.5%
New motor vehicle sales (thousand of units)	July	130.5	4.0%	8.0%
Wholesale trade (\$ billion)	July	30.2	0.4%	10.3%
<b>LABOUR</b>				
Employment (millions)	August	14.67	0.0%	2.4%
Unemployment rate (%)	August	7.8	0.1†	-0.5†
Participation rate (%)	August	65.4	0.0†	0.3†
Average weekly earnings (\$)	July*	612.85	0.5%	1.2%
Help-wanted Index (1996=100)	August	158	-1.3%	9.9%
<b>INTERNATIONAL TRADE</b>				
Merchandise exports (\$ billion)	July	30.0	1.8%	15.8%
Merchandise imports (\$ billion)	July	26.9	0.3%	11.5%
Merchandise trade balance (all figures in \$ billion)	July	3.2	0.4	1.3
<b>MANUFACTURING</b>				
Shipments (\$ billion)	July	40.3	-0.1%	16.2%
New orders (\$ billion)	July	40.7	1.1%	13.4%
Unfilled orders (\$ billion)	July	49.5	0.7%	7.8%
Inventory/shipments ratio	July	1.27	0.02	-0.15
<b>PRICES</b>				
Consumer Price Index (1992=100)	August	111.1	0.3%	2.1%
Industrial Product Price Index (1992=100)	August*	122.5	0.4%	2.0%
Raw Materials Price Index (1992=100)	August*	120.5	2.3%	13.1%
New Housing Price Index (1992=100)	July	100.8	0.2%	0.6%

*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

# Infomat

## A weekly review

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The first (official) release of all statistical information produced by Statistics Canada occurs in *The Daily* (www.statcan.ca), available at 8:30 a.m. *The Daily* presents highlights from new data releases, along with sources, links and contacts for further information. It also contains schedules of upcoming major news releases and announces the Agency's new products and services.

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## Publications released from September 23 to 29, 1999

Division/Title of publication	Period	Catalogue number	Price: Issue/Subscription	
			Canada (C\$)	Outside Canada (US\$)
<b>CURRENT ECONOMIC ANALYSIS</b>				
Canadian economic observer	September 1999	11-010-XPB	23/227	23/227
<b>DISTRIBUTIVE TRADES</b>				
New motor vehicle sales	July 1999	63-007-XIB	13/124	
Retail trade	July 1999			
Internet		63-005-XIB	16/155	
Paper		63-005-XPB	21/206	21/206
<b>INDUSTRY MEASURES AND ANALYSIS</b>				
Gross domestic product by industry	June 1999	15-001-XPB	15/145	15/145
<b>INTERNATIONAL TRADE</b>				
Canadian international merchandise trade	July 1999			
Internet		65-001-XIB	14/141	
Paper		65-001-XPB	19/188	19/188
Imports by commodity	July 1999			
Microfiche		65-007-XMB	37/361	37/361
Paper		65-007-XPB	78/773	78/773
<b>MANUFACTURING, CONSTRUCTION AND ENERGY</b>				
Shipments of office furniture products	June 1999	35-006-XIB	11/21	

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

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Monday	Tuesday	Wednesday	Thursday	Friday
				1
4 Building permits, August 1999	5	6 Help-wanted index, September 1999	7 Homicide in Canada, 1998*  Population estimates, July 1, 1999*	8 Labour force survey, September 1999  September crop production estimates for 1999
11	12 New housing price index, August 1999  Computers in schools, 1999*	13 Government expenditures on culture, 1997/98*	14	15 Consumer price index, September 1999  New motor vehicle sales, August 1999
18	19 Composite index, September 1999  Travel between Canada and other countries, August 1999	20 Canadian international merchandise trade, August 1999  Wholesale trade, August 1999	21 Retail trade, August 1999	22
25 Canada's international transactions in securities, August 1999	26 Monthly survey of manufacturing, August 1999	27 Industrial product price index, September 1999  Raw materials price index, September 1999  Employment insurance, August 1999	28 Employment, earnings and hours, August 1999	29 Real GDP at factor cost by industry, August 1999  Heritage institutions, 1997/98*

**Note:** Except for the releases marked with an asterisk, all the release dates in this calendar are fixed. A more detailed calendar of fixed release dates for the entire year is available from Statistics Canada's web site at [www.statcan.ca](http://www.statcan.ca).