



Infomat

A Weekly Review

Friday, April 25, 1997

OVERVIEW

◆ Exports post smaller gain in February

Exports moved ahead in February, but posted a smaller gain than in January. With the slight increase on the exports side and with imports remaining stable, the trade surplus rose.

◆ Foreign investment slows

Although foreigners continued to invest in Canadian securities in February, the amount was much lower than the average of the previous two months.

◆ Strong retail sales continue

Retail sales are off to a strong start in 1997. February's large increase continued the pattern of expansion seen since the fall of 1996.

◆ Wholesale sales rise in all sectors

Sales by wholesalers increased in all sectors in February, bringing about the highest monthly increase in sales since March 1991.

◆ Consumers pay more for goods and services

Although the CPI rose between March 1996 and March 1997, the change was slightly lower than the annual rates of inflation recorded in the previous three months.

◆ Growth of Composite Index eases

Between February and March, the composite leading indicator eased, as the housing and financial markets softened after leading most of the upturn in the index since mid-1996.

Exports post smaller gain in February

After increasing 2.8% in January, exports posted a smaller gain in February, rising 0.6% to \$23.6 billion. Increased sales of machinery and forestry products helped keep exports up. Most other sectors posted declines. Export growth reflected strengthening sales to the United States, Europe, and Asia—with the exception of Japan.

Imports held steady at \$21.4 billion in February, after a 7.5% gain in January. Continued strength in industrial goods and consumer imports offset a drop in energy product purchases. Although there were gains from the United States and Japan, imports from all other trading partners slipped.

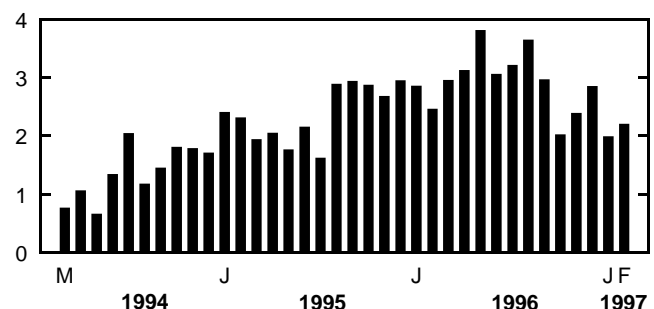
Given that imports were stable, the slight increase posted for exports helped boost the trade surplus to \$2.2 billion in February from \$2.0 billion in January. After a sharp drop in October, the trade surplus remained below its average level of 1996.

The strong increase in machinery exports (+5.1%) in February more than offset declines in the previous two months. Gains were mainly due to stronger markets overseas. In forestry exports, the large 6.4% gain was caused mainly by an increase in lumber sales to the United States, where unseasonably mild weather prompted a rise in home building activity. Wood pulp, newsprint and other paper and paperboard exports also registered gains, as did fertilizer sales, which rose in response to a higher farm demand in the United States.

(continued on page 2)

Trade balance

\$ billions, seasonally adjusted



... Exports post smaller gain in February

Much of February's export gain was offset by reduced shipments of industrial goods (-3.6%), including metal ores, chemicals, and precious metals. Energy products (-3.4%) and food (-2.6%) also contributed to lower exports. Crude oil and natural gas sales slowed in the month, reflecting the warmer weather in the United States. Automotive exports decreased 0.3% in February, as increased shipments of light trucks—mostly to the United States—were offset by reduced car and auto parts exports.

In February, energy imports dropped by more than 23%, after starting the year at an all-time high. Outside of energy products, declines were marginal. In automotive products, imports remained at near-record highs, while imports of machinery and equipment fell slightly. Despite February's pause in growth, the trend for machinery imports since mid-1996 has moved upward, reflecting strength in Canadian business investment.

Growth in industrial goods and consumer products helped mitigate import declines in February. Advances for industrial goods, led by refined metals, chemicals and plastics, reflected stronger manufacturing activity in Canada. Increased demand for consumer

Note to readers

Merchandise trade is one component of the current account of Canada's balance of payments, which also includes trade in services. In the fourth quarter of 1996, the overall merchandise trade surplus of \$7.2 billion contrasted with a current account deficit of \$1.7 billion.

goods reflected the more liberal spending habits of consumers in recent months.

Available on CANSIM: matrices 3611-3616, 3618-3629, 3651, 3685-3713, 3718-3720 and 3887-3913.

Canadian international merchandise trade (65-001-XPB, \$19/\$188) will be available shortly. Current account data, which incorporate merchandise trade statistics, services transactions, investment income and transfers, are available on a quarterly basis in **Canada's balance of international payments** (67-001-XPB, \$38/\$124). For further information, contact Suzie Carpentier (613-951-9647; 1 800 294-5583), International Trade Division. (See also "Current trends" on page 6.)

Foreign investment slows

Foreigners continued to invest in Canadian securities in February, purchasing \$1.1 billion, down from the \$3.5 billion average of the previous two months. Canadian residents purchased \$0.6 billion in foreign securities, the smallest amount in eight months.

Foreign investors purchased \$1.5 billion of Canadian debt securities in February: \$1.1 billion in money-market paper and the rest in bonds. The foreign buying in short-term paper came entirely from U.S. investors and was directed exclusively to federal treasury bills. Short-term interest rates remained higher in the United States than in Canada.

For the first time in five months, foreigners reduced their investment in Canadian stocks. They sold \$0.4 billion in February, after having accumulated \$2.2 billion since September 1996. The sale of new Canadian shares in foreign markets fell to its lowest level in over a year.

Canadian investors continued to buy foreign securities, but at a slower pace. February's investment went entirely into foreign stocks, while residents sold a small amount of foreign bonds. After four months of buying mainly U.S. stocks, Canadian investors switched back to buying predominately overseas stocks.

Available on CANSIM: matrix 2330.

The February 1997 issue of **Canada's international transactions in securities** (67-002-XPB, \$17/\$170) will be available shortly. For further information, contact Don Granger (613-951-1864), Balance of Payments Division.

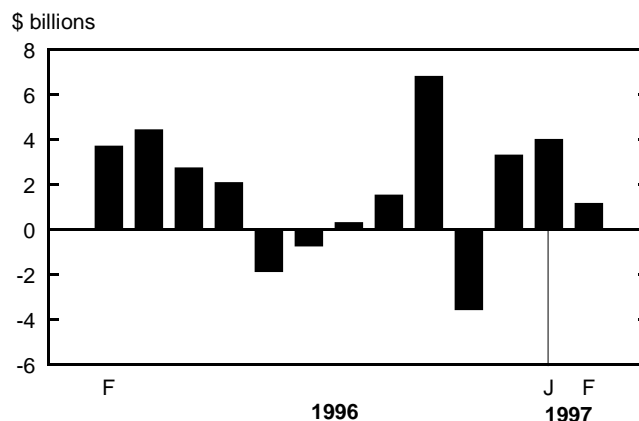
Note to readers

Interest rates: In February, both Canadian and U.S. short-term rates were virtually unchanged, leaving the differential some 225 basis points in favour of investing in the United States. This differential has been at this level since November 1996. In February, Canadian 10-year federal bond rates declined 25 basis points as similar U.S. rates drifted marginally lower. This left Canadian 10-year rates some 10 to 15 basis points below their U.S. counterparts.

Stock prices: Canadian stock prices, as measured by the TSE 300 Index, rose marginally in February (+0.8%) after a strong 3.1% gain in January. U.S. stock prices, as measured by Standard and Poor's Composite 500 Index, registered a small gain in February (+0.6%) after posting a strong 6.1% gain in January.

Canadian dollar: In February, the Canadian dollar depreciated 1.5 cents against the U.S. dollar, almost entirely eliminating its January gain.

Foreign investment in Canadian securities*



* Includes bonds, stocks and money market paper.

Strong retail sales continue

Retailers recorded a large increase in sales (+1.1%) in February, continuing the pattern of strong expansion seen since the fall of 1996. This advance followed a similar rise in January (+1.0%).

Although the automotive sector drove retail sales in late 1996, sales in the first two months of 1997 were more broadly based. Total retail sales, excluding motor vehicle dealers, increased 1.8% in January and 1.3% in February.

In February, consumers spent more in each of the seven retail trade sectors. In dollar terms, sales advanced the most in general merchandise stores (+3.7%), followed by gains in the automotive sector (+1.0%) and furniture stores (+2.0%). These three sectors accounted for over four-fifths of the month's increase.

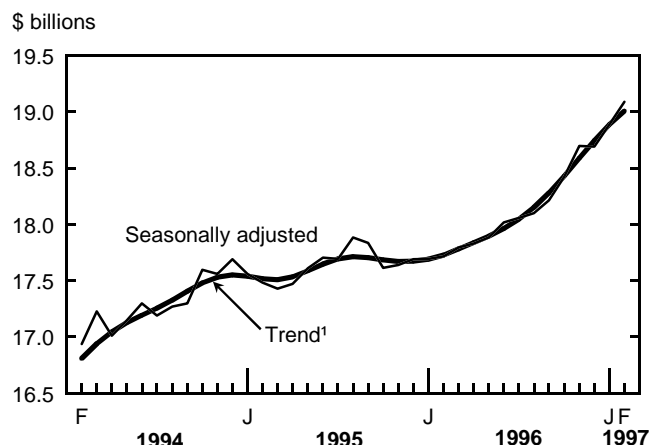
The increases in general merchandise store sales offset the declines recorded in December and January. Department stores recorded a 2.4% rise in sales in February. Other general merchandisers led the growth in this sector, with a 5.6% increase in sales.

The automotive sector posted healthy gains in February; over three-quarters of the increase was due to sales by automotive parts and accessories stores (+5.2%). Motor vehicle and recreational vehicle dealers posted a 0.3% increase in sales, following two months of declines. Sales were up 0.1% in gasoline service stations—9.0% greater than the level recorded in February 1996.

Consumers spent more in furniture stores in February. The record 2.0% gain surpassed the previous peak reached in December 1994. Advances in this sector have been strong since the spring of 1996.

In February, British Columbia retailers saw a 3.1% decline in sales following the artificially high levels recorded in January when shoppers returned after December's snowstorms. Excluding B.C., total retail sales in Canada increased by 1.5% in February.

Retail sales



1. Trend represents smoothed seasonally adjusted data.

Early estimates of March sales indicate an increase in the number of new motor vehicles sold. March figures showed an increase of 0.1% in the number of employees in retail trade and a 0.7% decline in the number of housing starts. Retail trade in the United States increased 0.2% in March, following a 1.5% increase in February.

Available on CANSIM: matrices 2299, 2398-2417 and 2420.

The February 1997 issue of *Retail trade* (63-005-XPB, \$21/\$206) will be available shortly. For further information, contact Louise G  n  reux (613-951-3549). For analytical information, contact Greg Peterson (613-951-3592), Distributive Trades Division.

Wholesale sales rise in all sectors

February was marked by across-the-board increases in sales by wholesalers, which resulted in a 3.0% jump in sales. This was the largest monthly increase since March 1991, when the wholesaling industry began to emerge from the recession. Wholesale sales reached \$23.1 billion in February, continuing the upward movement that began in January 1996. Between February 1996 and February 1997, monthly sales increased by 13.8%, in contrast to the relatively flat sales during 1995.

Increased sales were seen in all sectors. Wholesalers of farm machinery and equipment were the most active in February (+16.6%), reflecting the strong upward movement seen in 1996. Motor vehicles and parts were second (+7.2%), as new models, in conjunction with strong demand and low interest rates, boosted sales. Lumber and building materials sales were also strong (+5.0%), sustained by a strong residential market and by exports. Housing starts rose 9.6%, while exports of forestry products increased 6.4%.

In February, inventories increased by 1.2% to \$32.7 billion, the largest monthly increase in two years. The only declines in

Retail and wholesale trade, February 1997 Seasonally adjusted

| | Retail sales | | Wholesale sales | |
|-----------------------|---------------|--------------------------|-----------------|--------------------------|
| | \$ millions | % change, previous month | \$ millions | % change, previous month |
| Canada | 19,087 | 1.1 | 23,094 | 3.0 |
| Newfoundland | 293 | - 0.4 | 180 | - 1.4 |
| Prince Edward Island | 81 | 0.3 | 47 | 4.2 |
| Nova Scotia | 586 | 0.9 | 487 | 1.0 |
| New Brunswick | 439 | 0.9 | 299 | - 0.2 |
| Quebec | 4,677 | 2.0 | 4,866 | 0.8 |
| Ontario | 6,775 | 2.4 | 10,023 | 2.6 |
| Manitoba | 698 | 2.5 | 861 | 3.9 |
| Saskatchewan | 637 | 2.7 | 789 | 6.7 |
| Alberta | 2,098 | - 0.4 | 2,421 | 6.5 |
| British Columbia | 2,734 | - 3.1 | 3,096 | 4.5 |
| Yukon | 24 | - 5.7 | 10 | 3.9 |
| Northwest Territories | 44 | 4.1 | 14 | - 8.3 |

inventories were in motor vehicles and parts and lumber and building materials (both down 0.5%). However, these two groups showed some of the largest sales increases in February.

(continued on page 4)

... Wholesale sales rise in all sectors

The inventories-to-sales ratio, which was 1.44 in January, fell to 1.42 in February. This was the second consecutive month in which increases in sales outpaced inventories. Consequently, the inventories-to-sales ratio fell to its lowest level since December 1994. This ratio, which increased during 1995, fell throughout most of 1996.

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

The February 1997 issue of *Wholesale trade* (63-008-XPB, \$19/\$186) will be available shortly. For further information, contact Paul Gratton (613-951-3541) or Catherine Mamay (613-951-9683), Distributive Trades Division.

Consumers pay more for goods and services

Between March 1996 and March 1997, the Consumer Price Index (CPI) rose 2.0%. This increase was slightly lower than the 2.2% annual rates of inflation recorded in the previous three months.

In March 1997, consumers faced significant price increases for food, energy, postsecondary tuition, and purchasing and insuring vehicles compared with March 1996, while homeowners benefited from declines in mortgage interest charges. The slowdown in inflation this March was largely due to lower annual rates of increase for gasoline and food purchased from stores.

Consumer Price Index, March 1997
% change, previous year*

| | All-items | Food | Energy | Housing | Transportation |
|----------------------|------------|------------|------------|------------|----------------|
| Canada | 2.0 | 2.1 | 4.7 | 0.4 | 4.4 |
| Newfoundland | 3.5 | 4.2 | 7.2 | 1.9 | 4.7 |
| Prince Edward Island | 2.3 | 0.7 | 9.4 | 2.8 | 3.8 |
| Nova Scotia | 3.2 | 3.6 | 8.9 | 1.2 | 5.9 |
| New Brunswick | 2.5 | 3.1 | 8.6 | 1.1 | 5.1 |
| Quebec | 1.7 | 2.4 | 4.1 | 0.7 | 2.5 |
| Ontario | 2.3 | 0.6 | 3.1 | 0.3 | 6.9 |
| Manitoba | 2.9 | 3.8 | 5.6 | 1.9 | 4.0 |
| Saskatchewan | 2.1 | 3.0 | 3.0 | 1.6 | 3.8 |
| Alberta | 2.6 | 4.9 | 9.4 | 2.1 | 3.4 |
| British Columbia | 0.9 | 2.6 | 5.4 | -1.5 | 1.6 |
| Whitehorse | 2.9 | 6.3 | 9.3 | 1.2 | 5.1 |
| Yellowknife | 0.2 | -0.9 | 3.6 | -0.2 | 4.3 |

* Data are not seasonally adjusted.

Between February and March, consumers paid a little more (+0.2%) to purchase the goods and services that make up the CPI basket. Clothing and footwear, air travel, packaged travel tours, piped gas and cablevision services were the major contributors to this monthly increase. Lower gasoline and fuel oil prices and reduced mortgage interest charges partially offset the rise.

In March, clothing and footwear advanced for the third consecutive month (+1.2%), but prices were up only 0.4% compared with March 1996. Air fares advanced 8.9%, while quotations on package holiday tours rose 9.3%. Although March is a high season for these two forms of travel, the increases were greater than usual. Piped gas rates rose for the fourth consecutive month, mostly in Ontario and Manitoba. The wholesale price of piped gas rose due to high, unexpected demand. March rates were 9.9% above their 1996 level. The cost of cablevision services rose in Ontario and British Columbia.

Gasoline prices fell in March (-1.6%) following a 1.5% rise in February. Fuel oil prices were down 1.8% after six months of continuous increases. Mortgage interest charges continued to decline, falling 0.4%.

Changes in provincial CPIs between February and March 1997 ranged from 0.0% in Quebec to a 0.8% increase in Newfoundland.

Available on CANSIM: matrices 7440-7454, 7477 and 7478.

The March 1997 issue of the *Consumer Price Index* (62-001-XPB, \$11/\$103) is now available. For further information on this release, contact Sandra Shadlock (613-951-9606; fax: (613) 951-2848; Internet: shadsan@statcan.ca), Prices Division. (See also "Current trends" on page 6.)

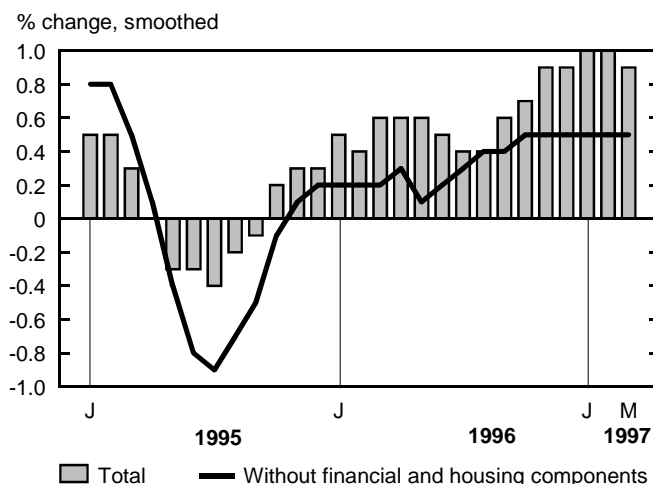
Growth of Composite Index eases

The composite leading indicator rose 0.9% in March, down from 1.0% in February, as the housing and financial markets softened after leading the upturn in the index since mid-1996. If these components were excluded, growth was steady at 0.5%.

In March, the financial market indicators lost some of their recent vigour. The stock market was slowed by interest rate hikes in the United States, and money supply growth also slowed. The housing index, after dominating the recent expansion of household demand, slowed in March. Housing starts levelled off, while sales of existing homes slipped in the first three months of the year after setting record highs late in 1996. However, sales of durable goods, led by auto purchases, remained vigorous.

Business spending continued to accelerate, in line with the higher investment intentions expressed at the beginning of the year. Firms continued to lead the upswing in service employment for the second consecutive month, while spurring orders for

Composite Index



(continued on page 5)

... Growth of Composite Index eases

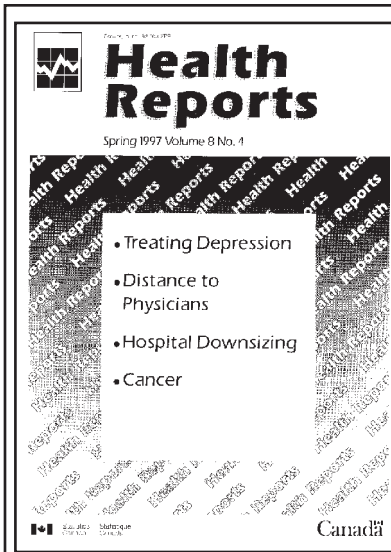
manufactured goods to their best increase in two years. The average workweek grew for the fourth consecutive month.

The U.S. leading indicator continued to improve, an encouraging sign for Canadian exports. In March, U.S. manufacturing indicators all posted strong increases, reflected in a 0.9% gain in industrial production.

Available on CANSIM: matrix 191.

*For further information on the economy, see the April 1997 issue of **Canadian economic observer** (11-010-XPB, \$23/\$227), now available. For further information on this release, contact Francine Roy (613-951-3627), Current Economic Analysis Group. (See also "Current trends" on page 6.)*

New from Statistics Canada



Health reports

Spring 1997

The Spring 1997 issue of *Health reports* contains articles entitled "Depression: An undertreated disorder?," "How far to the nearest physician?," "Downsizing Canada's hospitals, 1986/87 to 1994/95" and "Cancer incidence and mortality, 1997."

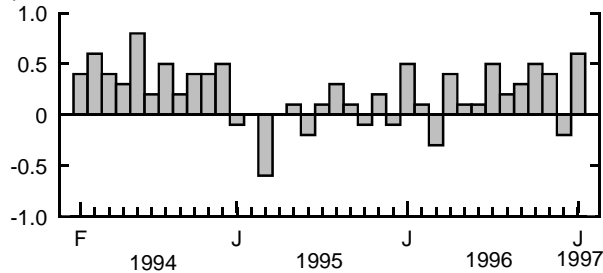
Health reports provides comprehensive and timely analysis of national and provincial health information and vital statistics derived from surveys or administrative databases. It is designed for a broad audience that includes health professionals, researchers, policy makers, educators and students.

*The Spring 1997 issue of **Health reports**, Vol. 8, no. 4 (82-003-XPB, \$35/\$116) is now available. For further information, contact Jane Gentleman (613-951-8553) or Client Custom Services (613-951-1746), Health Statistics Division.*

Current trends

Gross domestic product

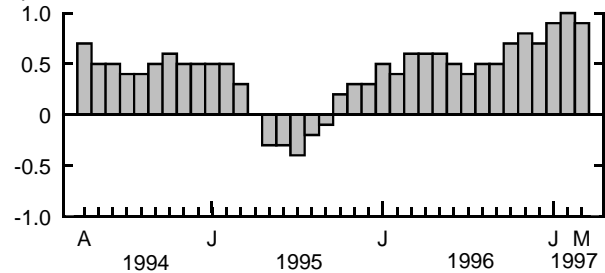
% change,
previous month



Real gross domestic product at factor cost increased 0.6% between December and January.

Composite Index

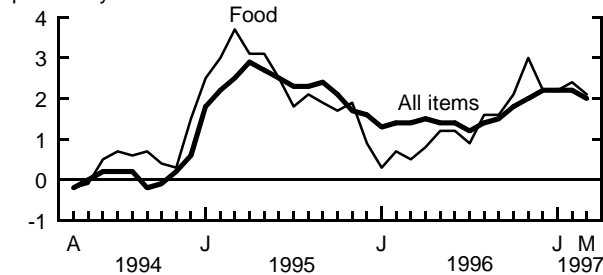
% change,
previous month



The Composite Index grew by 0.9% in March.

Consumer Price Index

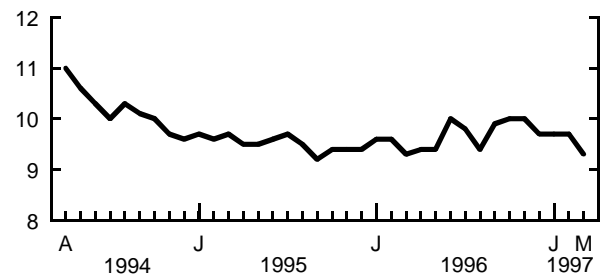
% change,
previous year



Consumers paid 2.0% more for goods and services in March 1997 than the year before. Food prices rose by 2.1%.

Unemployment rate

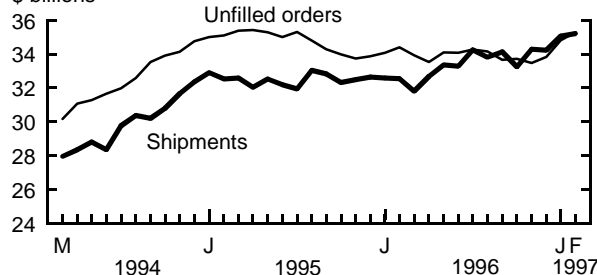
%



In March, the unemployment fell to 9.3%.

Manufacturing

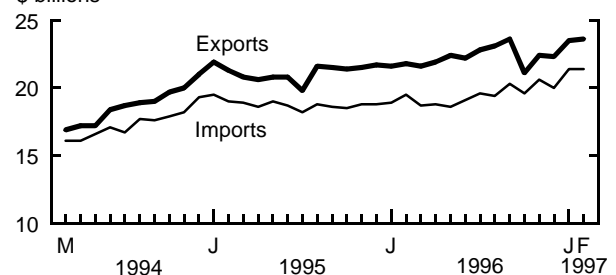
\$ billions



Manufacturers' shipments rose 0.6% in February to \$35.2 billion. The level of unfilled orders increased 0.8% to \$35.3 billion.

Merchandise trade

\$ billions



In February, the value of merchandise exports increased 0.6% from January to \$23.6 billion. Imports held steady at \$21.4 billion.

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

Latest monthly statistics

| | Period | Level | Change, previous period | Change, previous year |
|---|-----------|--------|-------------------------------|-----------------------------|
| GENERAL | | | | |
| Gross domestic product (\$ billion, 1986) | January | 560.9 | 0.6% | 2.8% |
| Composite Index (1981=100) | March* | 190.6 | 0.9% | 8.8% |
| Operating profits of enterprises (\$ billion) | Q4 1996 | 25.7 | 5.7% | 10.4% |
| Capacity utilization (%) | Q4 1996 | 84.8 | 0.7† | 2.4† |
| DOMESTIC DEMAND | | | | |
| Retail trade (\$ billion) | February* | 19.1 | 1.1% | 7.7% |
| New motor vehicle sales (thousand of units) | February | 111.4 | 5.1% | 14.5% |
| LABOUR | | | | |
| Employment (millions) | March | 13.8 | 0.4% | 1.1% |
| Unemployment rate (%) | March | 9.3 | - 0.4† | - 0.1† |
| Participation rate (%) | March | 64.5 | - 0.1† | - 0.3† |
| Labour income (\$ billion) | November | 36.5 | 0.8% | 3.6% |
| Average weekly earnings (\$) | January | 596.78 | 0.2% | 4.1% |
| INTERNATIONAL TRADE | | | | |
| Merchandise exports (\$ billion) | February* | 23.6 | 0.6% | 7.8% |
| Merchandise imports (\$ billion) | February* | 21.4 | - 0.3% | 10.1% |
| Merchandise trade balance (all figures in \$ billion) | February* | 2.2 | 0.2 | - 0.3 |
| MANUFACTURING | | | | |
| Shipments (\$ billion) | February | 35.2 | 0.6% | 8.2% |
| New orders (\$ billion) | February | 35.5 | - 2.0% | 7.9% |
| Unfilled orders (\$ billion) | February | 35.3 | 0.8% | 2.6% |
| Inventory/shipments ratio | February | 1.29 | 0.00 | - 0.11 |
| PRICES | | | | |
| Consumer Price Index (1986=100) | March* | 137.6 | 0.2% | 2.0% |
| Industrial Product Price Index (1986=100) | February | 129.8 | 0.1% | 0.0% |
| Raw Materials Price Index (1986=100) | February | 137.1 | - 3.2% | 5.5% |
| New Housing Price Index (1986=100) | February | 132.4 | 0.2% | 0.0% |

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

* new this week

† percentage point

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A weekly review

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Publications released from April 18 to 24, 1997

| Division/Title of publication | Period | Catalogue number | Price: Issue/Subscription | |
|---|---------------|------------------|---------------------------|-----------------------|
| | | | Canada (C\$) | Outside Canada (US\$) |
| CULTURE, TOURISM AND THE CENTRE FOR EDUCATION STATISTICS | | | | |
| Touriscope: International travel, advance information, Vol. 13, no. 2 | February 1997 | 66-001-PPB | 8/73 | 8/73 |
| DISTRIBUTIVE TRADES | | | | |
| Department store sales and stocks | January 1997 | 63-002-XPB | 17/165 | 17/165 |
| New motor vehicle sales | February 1997 | 63-007-XPB | 17/165 | 17/165 |
| Wholesale trade | February 1997 | 63-008-XPB | 19/186 | 19/186 |
| HEALTH STATISTICS | | | | |
| Cancer incidence in Canada | 1969 to 1993 | 82-566-XPB | 42 | 42 |
| Health reports, Vol. 8, no. 4 | Spring 1997 | 82-003-XPB | 35/116 | 35/116 |
| INDUSTRY | | | | |
| Construction type plywood | February 1997 | 35-001-XPB | 7/62 | 7/62 |
| Electric lamps (light bulbs and tubes) | February 1997 | 43-009-XPB | 7/62 | 7/62 |
| Energy statistics handbook | April 1997 | 57-601-UPB | 387 | 387 |
| General review of the mineral industries | 1995 | 26-201-XPB | 25 | 25 |
| Monthly survey of manufacturing | February 1997 | 31-001-XPB | 20/196 | 20/196 |
| Particleboard, oriented strandboard and fibreboard | February 1997 | 36-003-XPB | 7/62 | 7/62 |
| Primary iron and steel | February 1997 | 41-001-XPB | 7/62 | 7/62 |
| The sugar situation | Q1, 1997 | 32-013QXPB | 13/41 | 13/41 |
| Wholesale trade | February 1997 | 63-008-XPB | 19/186 | 19/186 |
| INTERNATIONAL TRADE | | | | |
| Canadian international merchandise trade | February 1997 | 65-001-XPB | 19/188 | 19/188 |
| Exports by commodity | | | | |
| microfiche version | January 1997 | 65-004-XMB | 37/361 | 37/361 |
| paper version | January 1997 | 65-004-XPB | 78/773 | 78/773 |
| Imports by commodity | | | | |
| microfiche version | January 1997 | 65-007-XMB | 37/361 | 37/361 |
| paper version | January 1997 | 65-007-XPB | 78/773 | 78/773 |
| Imports by commodity | | | | |
| microfiche version | February 1997 | 65-007-XMB | 37/361 | 37/361 |
| paper version | February 1997 | 65-007-XPB | 78/773 | 78/773 |
| INVESTMENT AND CAPITAL STOCK | | | | |
| Capital expenditures by type of asset | | | | |
| microfiche version | 1995 | 61-223-XMB | 26 | 26 |
| paper version | 1995 | 61-223-XPB | 42 | 42 |
| PRICES | | | | |
| The Consumer Price Index | March 1997 | 62-001-XPB | 11/103 | 11/103 |
| SERVICES, SCIENCES AND TECHNOLOGY | | | | |
| Telephone statistics | February 1997 | 56-002-XPB | 10/93 | 10/93 |

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| Key release calendar: May 1997 | | | | |
|---|---|---|--|--|
| Monday | Tuesday | Wednesday | Thursday | Friday |
| | | | 1 Business Conditions Survey, Canadian manufacturing industries, April 1997 | 2 |
| 5 Building permits, March 1997 | 6 Farm Input Price Index, Q1, 1997 Employment, earnings and hours, February 1997 | 7 | 8 Help-wanted Index, April 1997 | 9 Labour Force Survey, April 1997 |
| 12 New Housing Price Index, March 1997 | 13 New motor vehicle sales, March 1997 Field crop reporting series: March 31 grain stocks | 14 Census of Agriculture, 1996 | 15 Travel between Canada and other countries, March 1997 Consumer Price Index, April 1997 | 16 Monthly Survey of Manufacturing, March 1997 |
| 19 | 20 Wholesale trade, March 1997 | 21 Canadian international trade, March 1997 Retail trade, March 1997 | 22 Canada's international transactions in securities, March 1997 Composite Index, April 1997 | 23 Quarterly financial statistics for enterprises, Q1, 1997 |
| 26 Farm cash receipts, Q1, 1997 Net farm income, 1996 preliminary | 27 Characteristics of international travellers, Q4, 1996 | 28 Industrial Product Price Index, April 1997 Raw Materials Price Index, April 1997 | 29 Employment, earnings and hours, March 1997 Employment Insurance, March 1997 | 30 International travel account, Q1, 1997 |

* Release dates for International trade, the Consumer Price Index and the Labour Force Survey are fixed; dates for other data series may change.

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