# x miomal A Weekly Review 

Friday, August 14, 1998

## OVERVIEW

## - Employment rises slightly

Despite a rise in employment in July, the level of employment has changed little since April and the unemployment rate has remained stuck at $8.4 \%$.

- Manufacturers much less optimistic

Manufacturers, particularly those in the transportation equipment industries, are much less optimistic about production prospects than they were in April.

- Building permits lower in second quarter
The value of building permits declined in the second quarter of 1998, halting a series of five consecutive quarterly increases.


## - Strongest productivity gains since 1984

Last year, Canada's business sector made its strongest advances in labour productivity since 1984.

## - Labour income slipped in May

The labour income of Canadians declined in May for the first time since November 1997.

## - Slowdown in department store sales

June was the third consecutive month of decreasing department store sales-the first time this has occurred since the first quarter of 1993.

## Employment rises slightly

Employment increased slightly in July (+27,000), offsetting most of the significant loss in June. Following a strong upward trend in 1997 and in early 1998, there has been little change in employment since April, and the unemployment rate has remained stuck at $8.4 \%$ for four consecutive months. Youth employment increased in July, as did self-employment. The number of persons employed in services grew, but there were job losses in the goods-producing sector.

Among adults, employment was almost unchanged in July. The number of full- and part-time workers was also almost unchanged. Over the last five months, there has been little change in full-time employment, whereas it accounted for almost all of the growth during the preceding year. The number of employees in the public and private sectors was unchanged in July. Moreover, the number of persons employed in the private sector has shown little change since April. By contrast, the private sector accounted for $91 \%$ of overall employment growth in 1997 and early 1998.

Youth employment grew by 25,000 in July, reversing most of the loss in June. The number of unemployed youths fell by 14,000, lowering the youth unemployment rate by 0.6 percentage points to $15.3 \%$. From May to August, the Labour Force Survey collects data on youths aged 15 to 24 who went to school full time in March

## Employment



## ... Employment rises slightly

and who intend to return to school this fall. The overall student employment rate this July was slightly higher than it was in July 1997 because the employment picture has improved for 15- to 19-year-olds. However, the job situation for older students aged 20 to 24 has weakened. Among students aged 15 to $19,46.9 \%$ were employed this July, an increase of 2.4 percentage points over July 1997. The unemployment rate for this age group stood at $20.9 \%$, a drop of 2.8 percentage points. In contrast, $69.2 \%$ of the older students were employed, a drop of 1.1 percentage points from the same time last year. Despite the decline in employment for this age group, the unemployment rate fell 0.9 percentage points to $9.6 \%$ because of a decline in their labour force participation.

Employment grew by 56,000 from July in the services sector but fell by 29,000 in the goods-producing sector. The gain in services was concentrated in retail trade, where the number of persons employed rose by 35,000 - the first significant increase in this industry in 12 months. The finance, insurance and real estate industry also posted a job gain $(+14,000)$ after four consecutive months of losses. A drop of 34,000 in manufacturing employment was split about equally between the durable and nondurable goods industries. The General Motors strike in the United

States caused about 15,000 temporary layoffs in manufacturing during June and July in Ontario.

Among the provinces, higher employment in Quebec $(+19,000)$ was mitigated by more labour force participation, so that the unemployment rate in the province rose 0.3 percentage points. In Manitoba, 7,000 jobs were created, the first significant increase in employment there since August 1997. Newfoundland suffered its first significant drop in employment $(-5,000)$ since October 1996 after a string of three monthly increases. Ontario has gone three consecutive months without employment growth, and the province's unemployment rate remains stuck at April's level of $7.2 \%$. The employment picture was little changed in the other provinces and territories in July.
Available on CANSIM: matrices 3450-3471, 3483-3502 and table 00799999.
For a summary of the latest survey, the publication Labour force information, for the week ending July 18, 1998 (paper: 71-001PPB, \$11/\$103; delivery by fax: 71-001-PFB, \$300/year) is available. For further information, contact Deborah Sunter (613-951-4740) or Vincent Ferrao (613-951-4750), Household Surveys Division. See also "Current trends" on page 8.

| Labour Force Survey, July 1998 <br> Seasonally adjusted |
| :--- | :--- | :--- | :--- | :--- | :--- | :--- |

## Manufacturers much less optimistic

According to the July Business Conditions Survey, manufacturers, particularly those in the transportation equipment industries, are much less optimistic about production prospects than they were in April. Manufacturers do not expect to reduce employment levels, however. Overall, they do not feel that the current level of finished products inventories is a source of concern.

The transportation equipment industries were mostly responsible for the decline in optimism. These industries were hurt somewhat by strikes in the United States that caused parts shortages at the time of the survey. Overall, the rest of the manufacturing sector remains relatively upbeat regarding

## Note to readers <br> The Business Conditions Survey is conducted in January, April, July and October, and the majority of responses are recorded in the first two weeks of these months. Results are based on replies from about 5,000 manufacturers and are weighted by a manufacturer's shipments or employment. Consequently, larger manufacturers have a correspondingly larger impact on the results than smaller manufacturers. Except for the data on production difficulties, data in this release are seasonally adjusted.

production prospects in the coming three months. Thirty-five percent of manufacturers expect their production in the coming three months will decrease, whereas $21 \%$ expect their production will increase.

## ... Manufacturers much less optimistic

Manufacturers are only slightly less positive than they were in April about employment prospects. Thirteen percent of manufacturers stated they will be decreasing their work force, up two percentage points from April. Those stating they would increase their work force fell from $19 \%$ in April to $17 \%$ in July. According to the Labour Force Survey, almost 2.3 million people were employed in the manufacturing sector in June 1998.

Most manufacturers are still satisfied with the level of finished product inventories. In the July survey, $83 \%$ of manufacturers felt that their current level of finished products inventory was about right. Fifteen percent of manufacturers stated inventories are too high and $2 \%$ stated inventories are too low. The current balance of opinion stood at -13 , a one-point improvement over the April balance. Although still negative, the balance indicates much less worry than the balances of -37 and - 38 posted in the January and April surveys of 1991. The May 1998 Monthly Survey of Manufacturers indicated manufacturers were holding some $\$ 16.8$ billion in finished products inventory, $3.2 \%$ higher than the inventory level posted in the May 1997 survey.

Some $80 \%$ of manufacturers said their current level of unfilled orders is about right. The proportion of manufacturers stating higher-than-normal unfilled orders on their books fell from $10 \%$ in April to $7 \%$ in the July survey. Some $71 \%$ of manufacturers expect new orders to be about the same in the coming three months. In the April survey, only $59 \%$ of manufacturers shared this opinion.

A shortage of raw materials is a concern for $14 \%$ of manufacturers. This is a jump from the April survey. It is mostly

Manufacturers' expectations of production prospects in the next three months

attributable to concern about a shortage of parts in the transportation equipment industries due to the recent strikes in the United States. A shortage of skilled labour continued to be a concern for $7 \%$ of manufacturers. Working capital shortages were a concern for $4 \%$ of respondents, up from $2 \%$ in April.
Available on CANSIM: 2843-2845.
For further information, contact Claude Robillard (613-9513507; robilcg@statcan.ca), Manufacturing, Construction and Energy Division.

## Building permits lower in second quarter

The value of building permits declined in the second quarter of 1998, ending a series of five consecutive quarterly increases. An increase in non-residential permits, particularly for industrial projects, was more than offset by a decline in the residential sector. Municipalities issued building permits worth $\$ 8.4$ billion during the second quarter of 1998, down $1.7 \%$ from the first quarter. Permits for new housing declined $4.3 \%$ to $\$ 4.4$ billion, whereas planned construction for institutional, commercial and industrial projects advanced $1.5 \%$ to $\$ 4.0$ billion.

On a monthly basis, municipalities issued $\$ 2.8$ billion in permits in June, up $1.4 \%$ from May. Housing construction intentions edged up $0.6 \%$ to $\$ 1.4$ billion, following two consecutive decreases. The value of non-residential permits reached $\$ 1.3$ billion, up $2.3 \%$ over May.

In the second quarter, the value of permits declined for both single- and multi-family housing. Although it is still too early to specify a trend, the housing sector is showing signs of a slowdown. The value of residential permits for the first half of 1998 was $1.6 \%$ lower than in the first half of 1997. This decline resulted from lagging construction intentions for single-family dwellings ( $-5.6 \%$ to $\$ 6.4$ billion), which more than offset an increase in multi-family housing permits ( $+9.7 \%$ to $\$ 2.6$ billion). Historically,


#### Abstract

Note to readers The monthly Building and Demolitions Permits Survey covers 2,600 municipalities that represent $94 \%$ of the population. It provides an early indication of building activity. The value of planned construction activities shown in this release excludes engineering projects (for example, waterworks, sewers, culverts) and land. The annual rate is a monthly figure that has been seasonally adjusted and multiplied by 12 to reflect annual levels. Unless otherwise stated, the data are seasonally adjusted to ease comparisons by removing the effects of seasonal variations.


single-family housing accounts for more than $70 \%$ of all housing construction.

Despite the decline in the second quarter, the housing sector remains in reasonable shape. The value of permits in the quarter was only $1.3 \%$ behind levels in the corresponding period of 1997, which was a strong year for permits. Further, the value of permits issued for multi-family dwellings between April and June was $5.7 \%$ higher than in 1997, although it was not enough to compensate for a $4.0 \%$ decrease in the single-family component.

In contrast to the residential sector, the non-residential side has maintained momentum since the beginning of 1998. Nonresidential construction intentions in the first half of 1998 were $34.8 \%$ above levels in the first half of 1997. Industrial projects
(continued on page 4 )

## ... Building permits lower in second quarter

propelled the sector, where the value of permits reached $\$ 4.0$ billion in the second quarter-the highest figure since the first quarter of 1990 and a $1.5 \%$ increase over the first quarter of 1998. Only the industrial sector recorded an increase, as intentions climbed $20.6 \%$ over the first quarter of 1998 to reach $\$ 1.1$ billion. Construction of new manufacturing plants contributed the most to the industrial activity in the second quarter, which reached its highest level since the fourth quarter of 1989. The institutional component recorded the most significant decrease from the first quarter, down $12.4 \%$ to $\$ 864$ million. However, this retreat followed five consecutive quarterly increases. A reduction in construction plans of government administrative buildings was mostly responsible. In the commercial component, permits edged down $0.6 \%$ to $\$ 2.0$ billion. For the first six months of 1998, the value of building permits for each of the three components was at least $32 \%$ higher than in the corresponding period of 1997.

Available on CANSIM: matrices 80 (levels 3-7, 16-22 and 2432), 129, 137, 443, 989-992, 994, 995 and 4073.

The June 1998 issue of Building permits (64-001-XIB, \$19/ \$186) is now available on the Internet at www.statcan.ca. For analytical information, contact Michel Labonté (613-951-9690; labomic@statcan.ca), Investment and Capital Stock Division.

Value of non-residential building permits


Building permits ${ }^{1}$, Second quarter 1998
Seasonally adjusted

|  | Total |  | Residential |  | Non-residential |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | \$ millions | \% change, previous quarter | \$ millions | \% change, previous quarter | \$ millions | \% change, previous quarter |
| Canada | 8,352.5 | - 1.7 | 4,401.1 | -4.3 | 3,951.4 | 1.5 |
| Newfoundland | 45.6 | - 33.2 | 29.3 | -41.0 | 16.4 | - 12.3 |
| Prince Edward Island | 27.3 | 33.9 | 14.1 | - 1.0 | 13.2 | 115.4 |
| Nova Scotia | 147.4 | 27.1 | 77.2 | 20.1 | 70.2 | 35.7 |
| New Brunswick | 114.2 | 12.9 | 59.6 | 4.8 | 54.6 | 23.4 |
| Quebec | 1,297.8 | -4.9 | 638.1 | -4.4 | 659.7 | - 5.4 |
| Ontario | 3,395.0 | - 14.1 | 1,964.0 | - 5.2 | 1,431.1 | -23.9 |
| Manitoba | 348.9 | 62.0 | 89.7 | - 1.6 | 259.2 | 108.7 |
| Saskatchewan | 196.1 | 60.1 | 71.6 | 29.1 | 124.5 | 85.8 |
| Alberta | 1,525.7 | 19.7 | 701.6 | - 7.3 | 824.1 | 59.1 |
| British Columbia | 1,207.8 | -3.3 | 736.1 | -3.9 | 471.7 | -2.3 |
| Yukon | 9.9 | 53.0 | 4.2 | 18.8 | 5.7 | 94.2 |
| Northwest Territories | 36.8 | 1,073.9 | 15.6 | 1,790.6 | 21.2 | 817.4 |

1. Data may not add to totals due to rounding. Some percentage changes should be interpreted with caution because of the small numbers involved.

## Strongest productivity gains since 1984

After two straight years of virtually no improvement, the business sector's labour productivity increased $2.9 \%$ in 1997 amid strong economic growth and surging business investment. This was the strongest productivity gain since 1984, when labour productivity grew $3.3 \%$ as the economy recovered from the 1982 recession. Until 1996, productivity gains in business were far less impressive than they were during the mid-1980s. However, taking 1997's solid rebound into account, productivity since the 1991 recession has in fact grown at almost the same pace
as during the previous economic cycle in the 1980s. Labour productivity increased an average $1.1 \%$ a year between 1982 and 1991, while it increased an average $1.2 \%$ a year between 1991 and 1997.

Productivity is a measure of production efficiency that most economists regard as the foundation of growth in a country's standard of living. Labour productivity is a measure of the output per worker and is closely related to the remuneration paid to employees. It grows both when businesses become more efficient and when businesses increase the amount of machinery and equipment and advanced technologies that each worker uses.

## ... Strongest productivity gains since 1984

Manufacturing (a significant segment of the business sector) increased its productivity by $2.7 \%$ in 1997-more than double the rate of increase in 1996. Between 1991 and 1997, productivity in manufacturing has increased at an average annual rate of $2.3 \%$. The largest average annual increase in productivity during the same period was in the services sector, where productivity in communications and other utilities grew $3.3 \%$.

The $2.9 \%$ increase in labour productivity in Canada in 1997 was better than the performance in the United States, where labour productivity increased $1.8 \%$ in 1997 , just under the $2.0 \%$ growth recorded in 1996. Between 1991 and 1997, labour productivity in the business sector grew an average of $1.2 \%$ a year in Canada and $1.3 \%$ a year in the United States. However, despite the similarity in productivity growth rates, output per person and hours worked have both risen faster in the United States.

Hourly compensation is also growing more slowly in Canada $(+2.3 \%$ in 1996, $+3.2 \%$ in 1997) than in the United States $(+3.9 \%$ in both 1996 and 1997). Last year was the sixth straight year that Canadian workers in the commercial sector received lower pay increases than their American counterparts. Since the 1991 recession, hourly compensation has increased an average of $1.9 \%$ a year in Canadian businesses, compared with a $3.3 \%$ gain in the United States. (Because hourly compensation takes into account benefits and labour income earned by the self-employed, it is the most comprehensive measure of labour costs for these comparisons.)

The sliding Canadian dollar and the faster-growing compensation of American workers have both helped to keep the unit labour cost of doing business in Canada lower than in the United States. In 1997, for a fifth consecutive year, the increase in unit labour costs in Canada ( $+0.3 \%$ ) was below that in the United States (+2.0\%). Since 1991, unit labour costs have risen an average of only $0.7 \%$ a year for Canadian companies, whereas they have risen an average of $1.9 \%$ in the United States. However, when the slide in the Canadian dollar is taken into account, the unit labour costs of Canadian businesses actually declined $1.2 \%$

## Note to readers

Labour productivity, or real GDP per hour worked, is the ratio between output and labour input (hours worked). Economic performance as measured by labour productivity must be interpreted carefully, since these estimates also reflect changes in the other factors of production. In this article, the term productivity refers to labour productivity.
Unit labour cost is the labour cost per unit of output. It is calculated as the ratio between labour compensation and real gross domestic product. Unit labour cost will increase when labour compensation per hour worked increases more rapidly than labour productivity.
Total labour compensation includes all payments in cash or in kind by domestic producers to persons at work as remuneration for work. This includes the salaries and supplementary labour income of paid workers, plus an imputed labour income for self-employed workers.
These productivity measures exclude all non-commercial activities as well as the rental value of owner-occupied dwellings. Business GDP as defined here accounted for about $71 \%$ of GDP in 1992. Business sector goods include agriculture, fishing, forestry, mining activities, manufacturing, construction and public utilities. Business sector services comprise transportation and storage, communications, wholesale and retail trade, finance, insurance and real estate, and community, business and personal services.
in 1997, continuing the downward trend of the 1990s. Expressed in U.S. dollars, Canadian unit labour costs have fallen an average of $2.5 \%$ a year since 1991 .

## Available on CANSIM: matrices 9460-9473 and 9475-9483.

For further information, contact Jean-Pierre Maynard (613-951-3654; fax: 613-951-5403; maynard@statcan.ca), Microeconomic Studies and Analysis Division.

## Labour income slipped in May

Canadians' labour income (which includes wages and salaries and supplementary labour income) declined $0.2 \%$ to $\$ 38.3$ billion in May - the first monthly decline since November 1997. Compared with May 1997, however, labour income grew by $3.0 \%$. Wages and salaries, which totalled $\$ 33.6$ billion in May, declined in all provinces and territories except Newfoundland, Nova Scotia, Manitoba, Saskatchewan and Alberta. Declines in average weekly earnings and employment both contributed to the decreases in wages and salaries.

The overall decline was led by a $1.2 \%$ drop from April in wages and salaries in mining, quarrying and oil wells. Among the other industries, wages and salaries fell in commercial and personal services $(-0.4 \%)$, trade $(-0.4 \%)$, federal administration and other government services ( $-0.8 \%$ ), local administration ( $-0.8 \%$ ), other utilities ( $-0.8 \%$ ), health and social services ( $-0.3 \%$ ) and educational and related services $(-0.2 \%)$. Wages and salaries were up $0.4 \%$ from April in construction, up $0.3 \%$ in transportation and up $0.1 \%$ in financial services.

| Wages and salaries, May 1998 <br> Seasonally adjusted | \$ millions |  |  |
| :--- | ---: | ---: | ---: |
|  |  | \% change, <br> previous <br> month | \% change, <br> previous <br> year |
|  |  |  |  |
| Canada |  |  |  |
| Newfoundland | $\mathbf{3 3 , 6 0 3 . 9}$ |  | 3.1 |
| Prince Edward Island | 408.2 | 0.6 | 4.6 |
| Nova Scotia | 105.7 | -0.7 | -0.1 |
| New Brunswick | 811.3 | 0.2 | 3.8 |
| Quebec | 677.4 | -0.2 | 3.1 |
| Ontario | $7,287.0$ | -0.1 | 2.1 |
| Manitoba | $14,070.6$ | -0.3 | 3.5 |
| Saskatchewan | $1,118.3$ | 0.8 | 3.4 |
| Alberta | 900.6 | 0.8 | 4.7 |
| British Columbia | $3,595.8$ | 0.3 | 6.1 |
| Yukon and Northwest Territories | $4,418.1$ | -0.8 | 0.6 |

Seasonally adjusted

## ... Labour income slipped in May

## Available on CANSIM: matrices 6597-6624.

The May 1998 issue of Estimates of labour income, monthly estimates—Tables and analytical document (13F0016XPB, \$20/ $\$ 200$ ) are now available. Datasets are also available for purchase on microcomputer diskette (13F0016XDB). To purchase either product, contact the client services officer (613-951-3640, ieacrd@statcan.ca). For further analytical information, contact Katherine Fraser (613-951-4049; fax: 613-951-3618), Income and Expenditure Accounts Division.

## Note to readers

Labour income consists of wages and salaries (88\%), plus supplementary labour income (12\%). Wages and salaries include items such as bonuses, gratuities, taxable allowances and retroactive wage payments. Supplementary labour income is employers' contributions to employee welfare, pension, workers' compensation and Employment Insurance plans. Labour income accounts for about 52\% of the country's gross domestic product.

## Slowdown in department store sales

June was the third consecutive month of decreasing department store sales-the first time this has occurred since the first quarter of 1993. Part of the sales decline in June can be attributed to the closure of a number of department store locations. After declining $1.3 \%$ in May, department store sales were down $4.9 \%$ in June ( $\$ 1,348.9$ million seasonally adjusted) compared with May ( $\$ 1,419.0$ million).

On a year-over-year basis, seasonally adjusted sales were $1.8 \%$ higher in June compared with the same month a year earlier. This contrasts with $10 \%$ or more annual increases for most of 1997 and the first four months of 1998. Unadjusted for seasonality, department store sales were $0.8 \%$ higher in June compared with June 1997.

## Available on CANSIM: matrices 111-113.

For further information, contact Leslie Kiss (613-951-3556), Distributive Trades Division.

| Department store sales including concessions, June 1998 Unadjusted |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: |
|  | $\begin{aligned} & \text { June } \\ & 1998 \end{aligned}$ | June 1997 to June 1998 | January to June 1998 | $\begin{array}{r} \text { January-to- } \\ \text { June 1997 } \\ \text { to January-to- } \\ \text { June } 1998 \end{array}$ |
|  | \$ millions | \% change | \$ millions | \% change |
| Canada | 1,263.7 | 0.8 | 7,010.2 | 9.0 |
| Newfoundland and Prince Edward Island ${ }^{1}$ | 22.7 | 1.8 | 123.2 | 10.6 |
| Nova Scotia | 37.5 | 0.3 | 208.3 | 9.6 |
| New Brunswick | 28.2 | -0.1 | 154.5 | 10.0 |
| Quebec | 237.8 | -0.8 | 1,313.9 | 8.6 |
| Ontario | 537.9 | 0.7 | 2,958.3 | 9.8 |
| Manitoba | 53.5 | 0.0 | 294.2 | 8.7 |
| Saskatchewan | 43.1 | 2.7 | 232.0 | 10.5 |
| Alberta | 144.4 | 6.7 | 817.5 | 14.0 |
| British Columbia, Yukon, Northwest Territories ${ }^{1}$ | 158.6 | -1.4 | 908.3 | 2.1 |

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


## Education Quarterly Review <br> 1998

Education Quarterly Review features the articles "Distance education: Reducing barriers" and "Getting ahead in life: Does your parents' education count?".

Each issue also includes a series of social, economic and educational indicators for Canada, the provinces and territories, and the G-7 countries.
Education Quarterly Review, Vol. 5, no. 1, is now available (paper: 81-003-XPB, \$21/\$68; Internet version: 81-003-XIB, \$16/\$51). For further information, contact Jim Seidle (613-9511500; fax: 613-951-9040; seidjim@ statcan.ca), Culture, Tourism and The Centre for Education Statistics.

## Growing up with Mom and Dad? The intricate family life courses of Canadian children 1994-1995

This publication provides a detailed analysis of datasets from the National Longitudinal Survey of Children and Youth, which focus on family history and the custody of children.

The article, which was written by Nicole Marcil-Gratton (Centre interuniversitaire d'études démographiques, Department of Demography, University of Montreal), profiles the changing nature of family environments. Also examined are children who experience life in lone-parent families at younger and younger ages, the risk factors for children associated with different types of conjugal unions, and the frequency of parents re-establishing old, or establishing new, conjugal relationships.
Growing up with Mom and Dad? The intricate family life courses of Canadian children (89-566-XIE) is now available free on the Internet at www.statcan.ca. For further information, contact Yvan Clermont (613-951-3326), Special Surveys Division, or Susan McKellar (613-953-
 4230), Human Resources Development Canada.

## Current trends





Consumers paid $1.0 \%$ more for goods and services in


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

|  | Latest monthly statistics |  |  |
| :--- | :--- | :--- | :--- | :--- |
|  |  |  |  |
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## Infomat <br> A weekly review

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Editor: Tim Prichard (613) 951-1197; prictim@statcan.ca
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