



# Infomat

## A Weekly Review

Friday, September 20, 1996

### OVERVIEW

#### ◆ Trade surplus shrinks slightly

Record exports in July did not keep the trade surplus from shrinking, since imports grew more rapidly.

#### ◆ Shipments advance markedly

July was a robust month for manufacturers as shipments climbed 3.0% to \$34.4 billion.

#### ◆ Annual inflation rate remains low

The annual inflation rate as measured by the Consumer Price Index was 1.4% in August, up from 1.2% in July.

#### ◆ Composite index maintains steady growth

In August, the composite index continued to grow at a steady rate of 0.4%.

#### ◆ Foreigners made fewer trips to Canada in July

After June's record number, foreigners made fewer overnight trips to Canada in July.

#### ◆ Literacy in Canada: Unchanged from five years ago

The fundamental story on literacy in Canada remained in 1994 the same as five years earlier, according to an extended analysis of data from the International Adult Literacy Survey.

### Trade surplus shrinks slightly

Canada's exports advanced 2.1% in July to a record \$22.5 billion. The value of imports grew for a second straight month (+3.2%), reaching \$19.4 billion — their highest level since February. Canada's trade surplus dropped slightly from June's level to \$3.1 billion. Growth in surpluses with Japan and the United States was overshadowed by increased trade deficits with all other trading partners.

Exports received their greatest boost in July from lumber sales to the United States. Shipments shot up by nearly a third. This increase represents the first installment during the third quarter that softwood companies are allowed to sell in the United States under the new lumber agreement. Lumber exports have also benefited from higher prices, reflecting an improved U.S. housing market.

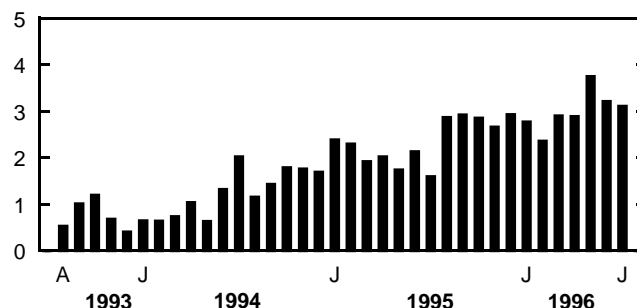
July's robustness in exports was equally felt by the automotive products sector (+1.2%). Auto production south of the border was strong, despite sluggish sales in both June and July. Exports of light trucks climbed 8.0%, whereas car exports dropped 6.7%.

Mixed movements in the energy sector brought about a marginal increase in the exports of energy products. Crude oil exports rose as did those of coal. Meanwhile, unseasonably cool weather in the United States cut the need for air conditioning, reducing demand for Canadian natural gas at U.S. utilities.

*(continued on page 2)*

#### Trade balance

\$ billions, seasonally adjusted



### ... Trade surplus shrinks slightly

In the agricultural sector, shipments of grain continued to decline, pulling down exports for a second consecutive month (-6.5%). Stocks of grains remain low, but are expected to be replenished with new stocks by September.

Further weakening July's gain were reduced exports of industrial goods (-0.8%) and machinery (-0.7%).

The majority of July's growth in imports was attributable to industrial goods (+6.5%) and machinery and equipment (+3.6%). Industrial goods were bolstered by increased purchases of metal ores by Canadian smelters, as well as by greater imports of chemical products and precious metals. Meanwhile, a second consecutive rise in machinery imports reflected the strength of aircraft and other transportation equipment imports, as well as industrial and agricultural equipment imports.

Automotive products imports were buoyed by parts imports, consistent with July's unseasonably robust manufacturers' shipments in the motor vehicle industry. Down were imports of cars and trucks, in part reflecting poor sales in Canada during June and July.

#### 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 second quarter of 1996, an overall merchandise trade surplus of \$9.9 billion contrasted with a current account surplus of \$1.1 billion.*

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

*The July 1996 issue of **Canadian international merchandise trade** (65-001-XPB, \$19/\$182) will be available shortly. Current account data (incorporating statistics on merchandise trade, services transactions, investment income and transfers) are available on a quarterly basis in **Canada's balance of international payments** (67-001-XPB, \$36/\$120). For further information, contact Suzie Carpentier (613-951-9647 or 1-800-294-5583), International Trade Division. (See also "Current trends" on page 8.)*

## Shipments advance markedly

July was a robust month for manufacturers as shipments climbed 3.0% to \$34.4 billion. Until a few months ago, the trend in shipments had been flat. The latest increase was widespread, occurring in 17 of the 22 major industry groups, which accounted for almost 90% of total shipments. Atypical of the season, July's burst of strength came mainly from the motor vehicles and parts sector (+5.6%). The electrical and electronic products and the wood industries also shone.

Shipments from the motor vehicle and parts sector, the largest component of manufacturing, jumped 5.6% even though most auto plants were shut down for two weeks for customary holidays and re-tooling. Those that remained open stepped up activity due to strong demand from the United States. Motor vehicle shipments rose 6.0%, while motor vehicle parts and accessories increased 4.7%.

Shipments of electrical and electronic products bounced back a significant 10.7% after steep declines that had seen them fall more than 11% from an all-time high in February 1996. The earlier declines were caused by stiff competition from overseas manufacturers in the office machines industry. The situation now appears to have stabilized, thanks to added buoyancy from the telecommunications equipment industry.

Wood products shipments rose 7.9% in July, the first month of a new quarter under the quota-based trading agreement with the United States. Manufacturers, having reached the previous quarter's imposed limit, rushed to meet pent-up housing-related demand from the United States. The budding recovery in shipments of the paper and allied products industry vanished in July as flood damage in Quebec forced several mills to close.

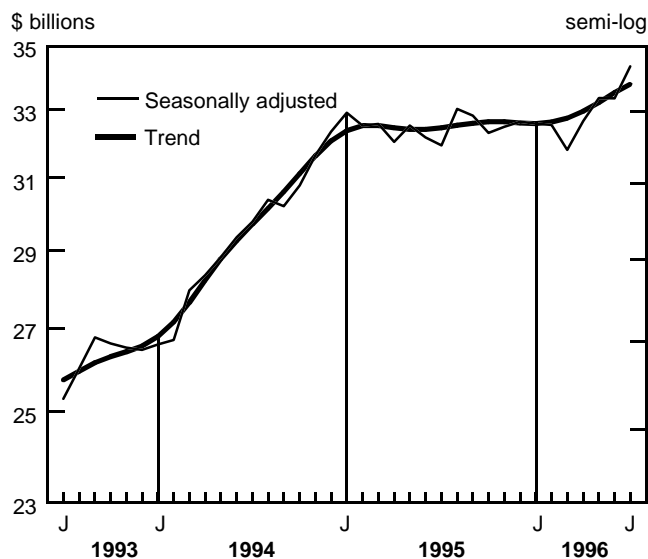
Inventories declined for a fourth consecutive month in July, falling 0.4% to \$44.4 billion. After rising during most of 1995, inventory growth recently hit a ceiling and began to trend downward. Total inventories are now 2.4% below the all-time high reached in March 1996. The most significant decreases in inventories in July were in aircraft and parts (-5.0%) and electrical

#### Note to readers

*Unfilled orders are the stock of orders that will contribute to future shipments, assuming they are not cancelled.*

*New orders represent orders received, whether shipped in the current month or not. They are measured as the sum of shipments for the current month (i.e., orders received this month and shipped within the same month) plus the change in unfilled orders.*

### Shipments



and electronic products (-3.1%). Inventories of paper and allied products continued to trend downward for a fifth month. Increases in inventories occurred in the food (+1.2%) and motor vehicle (+3.2%) industries.

(continued on page 3)

### ... Shipments advance markedly

The rise in shipments and the fall in inventories reduced the inventories-to-shipments ratio from 1.34 in June to 1.29 in July, its lowest level in 17 months. The ratio reached a three-year high of 1.43 in March 1996. (When falling, the ratio points to a possible undersupply, suggesting output may have to be increased.) The changed direction in inventories is welcome, according to the July Business Conditions Survey. Moreover, manufacturers are now less worried about inventory levels and more optimistic about production prospects.

Manufacturers' backlog of unfilled orders, a key determinant of future shipments, rose 0.7% to \$34.4 billion in July. Unfilled orders have settled into a changing pattern of increases and decreases after weakening significantly in late 1995. Unfilled orders remained 2.9% below the all-time high reached in April 1995. Two of the most significant increases in unfilled orders were in machinery (+4.4%) and electrical and electronic parts (+1.2%), which turned up after three consecutive declines. The order books of the aircraft and parts industry were slimmer in July. Orders of aircraft have levelled off in recent months after growing strongly during 1994 and most of 1995.

New orders were up 3.7% to \$34.6 billion.

### Manufacturers' shipments, July 1996

Seasonally adjusted

	\$ millions	% change, previous month
<b>Canada</b>	<b>34,355</b>	<b>3.0</b>
Newfoundland	133	14.4
Prince Edward Island	49	10.0
Nova Scotia	515	0.6
New Brunswick	650	0.8
Quebec	8,015	0.0
Ontario	18,413	4.1
Manitoba	733	-2.8
Saskatchewan	435	3.8
Alberta	2,535	2.8
British Columbia	2,873	6.9

**Available on CANSIM: matrices 9550-9593.**

The July 1996 issue of *Monthly survey of manufacturing* (31-001-XPB, \$19/\$190) will be available shortly. For further information, contact Robert Traversy (613-951-9497), Industry Division. (See also "Current trends" on page 8.)

## Annual inflation rate remains low

The annual inflation rate as measured by the Consumer Price Index (CPI) was 1.4% in August, up from 1.2% in July. So far in 1996, the average of each month's annual rate has been 1.4%. In August, consumers faced significant price increases for new vehicles, gasoline, telephone services, travel services and meat other than beef. But they paid less for mortgage interest, new houses and beef. These changes traced the price trends seen in July, when inflation posted its lowest annual rate since January 1995.

In monthly terms, after seeing prices remain unchanged between June and July, consumers saw only a marginal price increase (+0.1%) from July to August. Much of the upward pressure came from clothing and footwear (+1.2%) and transportation (+0.2%); these were offset by lower prices for food (-0.3%) and shelter (-0.1%).

Among the increases, the rise in the clothing and footwear component was led by a 2.2% jump in the price of women's clothing. Although many clothing prices returned to normal in August after summer sales, higher costs of cotton, polyester, silk and lace hiked prices for women's clothing. Food prices showed a seasonal change as fresh vegetable prices dropped 10.6%; the decline in food prices was moderated by higher prices for bakery products, apples, oranges, pork and processed meat. As for transportation, the increase was driven by higher vehicle insurance premiums in Ontario and Prince Edward Island. Gasoline prices crept 0.2% higher as price wars ended in the Maritimes and Quebec.

The decline in shelter charges reflected lower mortgage interest charges (-0.5%) and homeowners' maintenance and repair charges (-1.2%), as carpet prices decrease. Rented accommodation charges moved higher (+0.1%).

### Consumer price index, August 1996

% change, previous year\*

	All-items	Food	Energy	Housing	Transportation
<b>Canada</b>	<b>1.4</b>	<b>1.6</b>	<b>2.0</b>	<b>-0.1</b>	<b>3.3</b>
Newfoundland	1.5	2.7	-1.6	0.3	1.7
Prince Edward Island	1.8	4.6	-0.3	0.6	1.6
Nova Scotia	1.8	3.1	1.8	1.8	0.9
New Brunswick	1.8	2.5	1.3	1.4	1.5
Quebec	1.6	2.7	1.6	0.9	2.0
Ontario	1.3	0.8	2.0	-0.4	4.2
Manitoba	2.4	2.6	2.4	0.6	5.3
Saskatchewan	1.8	2.8	2.8	2.4	2.2
Alberta	2.4	2.1	7.8	0.9	4.7
British Columbia	0.4	0.2	0.3	-2.6	2.2
Whitehorse	2.1	3.3	3.3	-0.2	4.4
Yellowknife	1.3	1.2	4.2	0.1	4.6

\* Data are not seasonally adjusted.

Across Canada, British Columbians continued to enjoy the country's lowest annual inflation rate, while Manitobans and Albertans experienced the highest. On a monthly basis, the all-items index remained unchanged in Quebec, dropped in Prince Edward Island (-0.4%) and British Columbia (-0.1%), and notched up by between 0.1% and 0.3% in the other provinces.

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

The August 1996 issue of *The consumer price index* (62-001-XPB, \$10/\$100) is available. For further information, contact Sandra Shadlock (613-951-9606; fax: 613-951-2848; Internet: shadsan@statcan.ca), Prices Division. (See also "Current trends," page 8.)

## Composite index maintains steady growth

In August, the leading indicator continued to grow at a steady rate of 0.4%, the same rate as in July and similar to the gains recorded so far this year. Widespread increases in spending offset a slowdown in the financial markets. Notably, 9 of the index's 10 components expanded, versus 8 in July and 6 in June.

Manufacturing was particularly strong. Recent gains in new orders were reflected in shipments and demand for labour, while inventories fell to their lowest level in over a year. This upswing in manufacturing mirrored greater demand for durable goods, led by spending on autos and capital goods. The trend of spending on durable goods has turned up. The increased value of building permits in July and the upward revision of investment intentions at mid-year suggest a rebound in investment spending as well.

Household demand remained mixed: an upturn in the demand for goods accompanied a slowdown for services. The rate of

growth in services employment continued to slow, pulled back by the personal services sector, as incomes remained weak. Meanwhile, sales of existing homes levelled off, dampening the housing index's growth from 1.9% in July to 1.1% in August. Housing starts have been recovering gradually, however, contributing to slightly improved furniture and appliance sales.

Financial components remained sluggish after making rapid gains earlier this year. The pickup in the stock market in August was not enough to offset the losses in June and July. As well, the merchandising sector remained weak.

**Available on CANSIM: matrix 191.**

The September 1996 issue of *Canadian economic observer* (11-010-XPB, \$22/\$220) is now available. The *Historical statistical supplement* (11-210-XDB, \$50) is also available for the first time ever in electronic format, allowing manipulation of the CEO's data in any software. For further information, contact Francine Roy (613-951-3627) or Dominique Pérusse (613-951-1789), Current Economic Analysis Group.

## Foreigners made fewer trips to Canada in July

In July, foreigners made 1.5 million overnight trips to Canada, a 2.2% drop from June's record. This type of travel has been on an upward trend since mid-1992. Residents of countries other than the United States made 375,000 of those trips, down 1.7% from the record high in June. Americans, who are Canada's largest source of foreign visitors, made 1.1 million overnight trips, a 2.3% drop from June.

Canadians meanwhile took 1.6 million overnight trips outside the country in July, a 0.9% decrease from the previous month. Of those, 303,000 trips were to overseas destinations. The number

### Note to readers

Month-to-month comparisons use seasonally adjusted data (data adjusted for variations that repeat annually and for variability caused by the different volumes of travellers associated with different days of the week). Year-over-year comparisons use unadjusted data (the actual traffic counts).

### Travel between Canada and other countries, August 1996

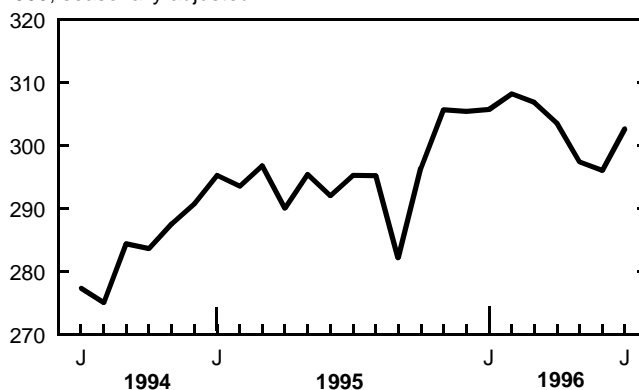
	% change, previous month		% change, previous year	
	'000		'000	
	seasonally adjusted		unadjusted	
<b>Canadian trips abroad</b>				
Auto trips to the United States				
Same day	2,979	-2.9	3,599	-5.9
One or more nights	811	1.2	1,408	-4.4
Total trips, one or more nights				
United States <sup>1</sup>	1,248	-1.6	1,856	-1.1
Other countries	303	2.2	269	-2.3
<b>Travel to Canada</b>				
Auto trips to the United States				
Same day	1,944	-1.4	2,844	-1.0
One or more nights	685	-6.1	1,533	-7.5
Total trips, one or more nights				
United States <sup>1</sup>	1,077	-2.3	2,201	-3.5
Other countries <sup>2</sup>	375	-1.7	723	9.8

<sup>1</sup> Estimates for the United States include counts of cars and buses, and estimated numbers for planes, trains, boats, and other methods.

<sup>2</sup> Figures for other countries exclude only same-day entries by land via the United States.

### Canadians' overnight trips to overseas destinations

'000, seasonally adjusted



of these trips rebounded 2.2% in July, after having declined for four months since reaching a record last February.

However, Canadians took fewer overnight trips to the United States in July (1.2 million, -1.6% from June). The number of such trips reached its most recent peak in December 1991 (1.8 million), when the Canadian dollar was worth US\$0.88.

The number of same-day cross-border car trips between Canada and the United States decreased in July: Canadians took 3.0 million trips of this type (-2.9%), while Americans made 1.9 million (-1.4%). It was the largest monthly decline in Canadians' same-day cross-border car travel since February 1995. Ameri-

(continued on page 5)

### ... Foreigners made fewer trips to Canada in July

cans' same-day excursions by car into Canada have been slowly declining in number every month since February 1996.

**Available on CANSIM: matrices 2662-2697, 5780-6046 and 8200-8328.**

The July 1996 issue of *International travel, advance information* (66-001-PPB, \$7/\$70) will be available shortly. For further information, contact Luc Dubois (613-951-1674, fax: 613-951-2909, Internet: [duboluc@statcan.ca](mailto:duboluc@statcan.ca)), Education, Culture and Tourism Division.

## Literacy in Canada: Unchanged from five years ago

The fundamental story on literacy for Canada in 1994 remained the same as it did five years earlier: significant numbers of adults had low-level literacy skills, which constrained their participation in society and in the economy. At the broadest level, literacy profiles have shown little change since 1989. This lends little support to earlier predictions of a continuing erosion of literacy skills in Canada.

In 1994, about 22% of adult Canadians over 16 years of age fell in the lowest performance level of literacy. That is, they had problems dealing with printed materials and most likely identified themselves as having difficulty reading. Another 24% to 26% fell in the second lowest level. Such individuals could deal only with material that was simple and clearly laid out, and with tasks that were not too complex. They can read, but not well.

Several other factors exert an influence on literacy performance levels. For example, literacy is strongly associated with economic opportunities in life. Notably, literacy is related to employment stability, unemployment and income. It goes without saying that literacy is also closely associated with educational attainment. However, education does not "fix" literacy forever: it can be influenced by what people do after leaving school.

A significant number of seniors have weak literacy skills. In 1994, more than 1.6 million people aged 65 and over — just under half the total population of seniors — were in the lowest performance level. This means a large portion of the population is restricted in their activities and often dependent on others to cope with the literacy activities of daily life.

### Note to readers

This article presents data from the Canadian component of the International Adult Literacy Survey (IALS), which measured literacy skills in seven developed nations. For the Canadian component, the survey covered 5,660 respondents aged 16 and over.

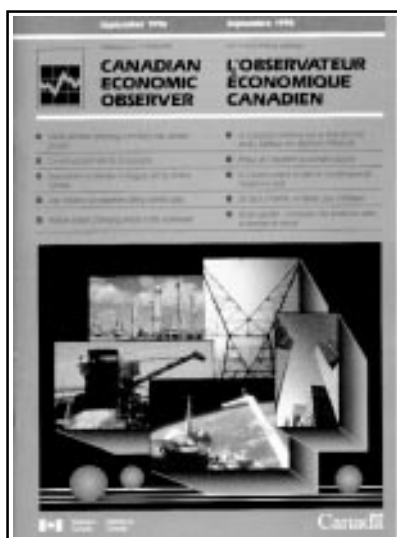
The IALS, conducted in 1994, defined literacy as the ability to understand and employ printed information in daily activities at home, at work and in the community, in order to achieve one's goals and to develop one's knowledge and potential. It identified five successive levels of literacy for each of three scales — prose, document and quantitative.

Overall, more than half of Canadians possessed skills in the top three literacy levels, meaning that they could meet most everyday reading requirements. However, in Quebec and Atlantic Canada, the ratio was slightly less than half, whereas in the four Western provinces, almost 60% of individuals fell into the top three skill levels.

A comparison of high-demand occupations with occupations in decline indicated that Canadian workers will require high literacy skills in future. The industries that have experienced growth are those whose employees had relatively high levels of skills.

The report ***Reading the future: A portrait of literacy in Canada*** (89-551-XPE, \$49) is now available. See "How to order publications." For further information, contact Special Surveys Division (613-951-9476).

## New from Statistics Canada



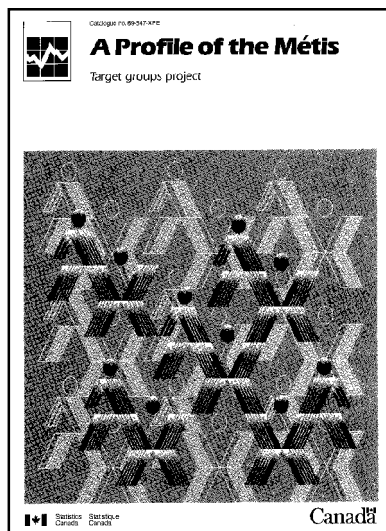
### Canadian economic observer

September 1996

The September 1996 issue of *Canadian economic observer*, Statistics Canada's flagship publication for economic statistics, summarizes the major economic events that occurred in August and features an article titled "The changing workweek: Trends in weekly hours of work". A separate statistical summary contains a wide range of tables and graphs on the principal economic indicators for Canada, the provinces and the major industrial nations.

The *Historical statistical supplement* is also now available in electronic format at additional cost. The Windows-based Adobe Acrobat Reader, which is built into this product, lets you view, print and transport the CEO's extensive range of data and graphics into the software of your choice.

The September 1996 issue of *Canadian economic observer* (11-010-XPB, \$22/\$220) is now available. To order the *Historical statistical supplement, 1995-96* on diskette (11-210-XDB, \$50), contact Cynthia Bloskie (613-951-3634; fax: 613-951-5403). For further information, contact Cynthia Bloskie (613-951-3634) or Francine Roy (613-951-3627), Current Economic Analysis Group. (Internet: [ceo@statcan.ca](mailto:ceo@statcan.ca)).



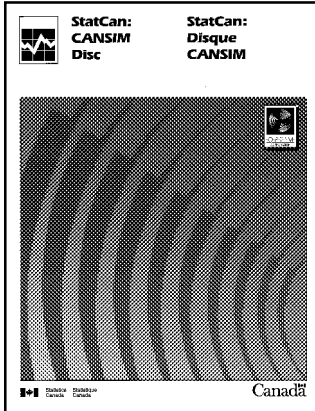
### A profile of the Métis

Based on the 1991 Aboriginal Peoples Survey, *A profile of the Métis* paints a broad portrait of the Métis people, one of Canada's three aboriginal groups. Among other characteristics, this report profiles the following: family status; education; labour force activity; and health and housing. It also examines many aspects of their cultural life, such as language, participation in traditional activities, time spent on the land, and use of the aboriginal-language media.

This report includes in the Métis population those who indicated aboriginal ancestry on the 1991 Census and who stated that they identified with the Métis people on the 1991 Aboriginal Peoples Survey.

*A profile of the Métis* (89-547-XPE, \$37) is now available. For further information, contact Josée Normand (613-951-2094; fax: 613-951-0387), Housing, Family and Social Statistics Division.

## New from Statistics Canada



### StatCan: CANSIM disc

September 1996

A comprehensive collection of data, simple retrieval software and excellent documentation make *StatCan: CANSIM disc* a valuable source of socio-economic information on Canada. The September 1996 edition of the CD-ROM puts over 700,000 series of current and historical data at your fingertips.

Retrieving data and reference material from the disc is easy. You can search by keyword or select from lists of progressively narrower topics to locate the information you need. A few keystrokes will give you data on subjects ranging from agriculture to zinc mining.

*In Canada, the StatCan: CANSIM disc costs \$1,995 for an annual subscription (one copy each year); in other countries, US\$1,995. Semi-annual subscriptions (the current release plus one update) cost \$2,995 in Canada and US\$2,995 in other countries. Discounted subscriptions for educational institutions are also available. For further information, contact your nearest Statistics Canada Regional Reference Centre.*

### StatCan: CANSIM time series directory

September 1996

The *CANSIM time series directory* serves as a guide to the data contained in Statistics Canada's CANSIM time series database. It is available three ways: on paper, CD-ROM and on-line. On-line access to the database is available world-wide through a number of distributors.

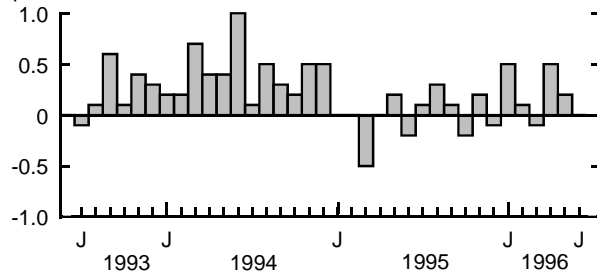
The CD-ROM version of the directory makes searching fast and easy by keyword or topic. The disc also contains the Statistical Data Documentation System (SDDS), a database of information about the agency's surveys and statistical programs. In addition, there is a thesaurus of terms, an instructional module called "About Statistics Canada data", as well as further information on data and services that are available.

*The September 1996 edition of the CANSIM time series directory is now available on paper or CD-ROM. On paper, the directory is a three-volume set with a semi-annual amendment (Canada: \$250; United States: US\$300; other countries: US\$350). An annual subscription to the CD-ROM (Canada: \$100; United States: US\$120; other countries: US\$140) comprises four quarterly issues. For further information, contact your nearest Statistics Canada Regional Reference Centre.*

## Current trends

### Gross domestic product

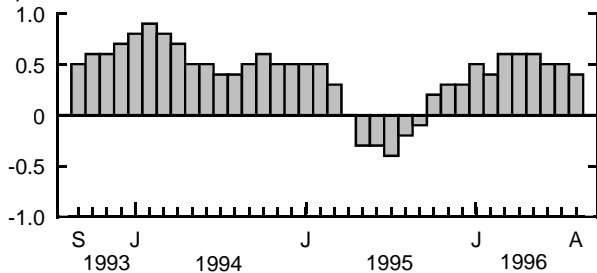
% change,  
previous month



Real gross domestic product at factor cost was unchanged in June.

### Composite index

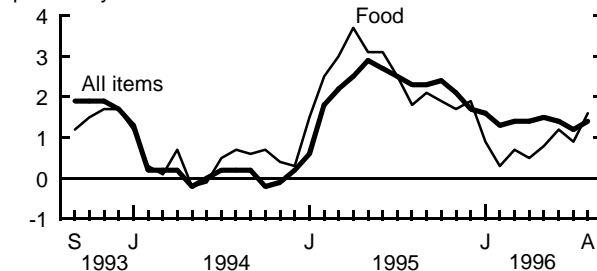
% change,  
previous month



The composite index grew by 0.4% between July and August.

### Consumer price index

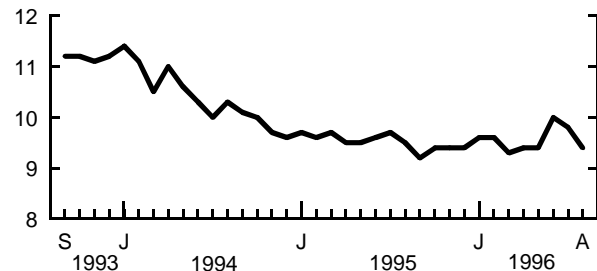
% change,  
previous year



Consumers paid 1.4% more for goods and services in August 1996 than the year before. Food prices rose by 1.6%.

### Unemployment rate

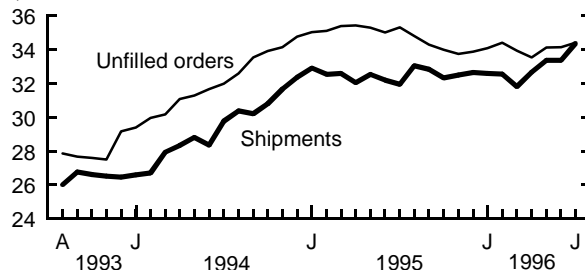
%



In August, the unemployment rate fell to 9.4%.

### Manufacturing

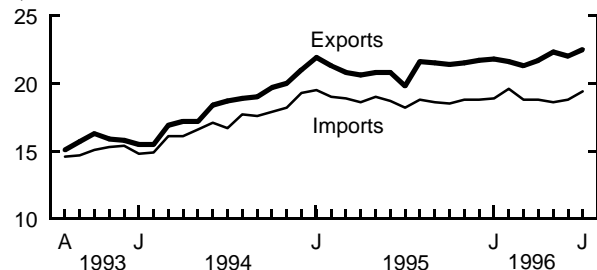
\$ billions



Manufacturers' shipments advanced 3.0% in July to \$34.4 billion. The level of unfilled orders rose 0.7% to \$34.4 billion.

### Merchandise trade

\$ billions



In July, the value of merchandise exports rose 2.1% from June to \$22.5 billion. Imports advanced 3.2% to \$19.4 billion.

**Note:** All series are seasonally adjusted except the consumer price index.



## Latest monthly statistics

	Period	Level	Change, previous period	Change, previous year
<b>GENERAL</b>				
Gross domestic product (\$ billion, 1986)	June	548.2	0.0%	1.4%
Composite index (1981=100)	August*	179.6	0.4%	4.8%
Operating profits of enterprises (\$ billion)	Q2 1996	22.1	-1.6%	-6.4%
Capacity utilization (%)	Q2 1996	82.7	0.3†	-0.9†
<b>DOMESTIC DEMAND</b>				
Retail trade (\$ billion)	June	17.9	0.6%	1.4%
New motor vehicle sales ('000 units)	July	96.4	-2.9%	4.3%
<b>LABOUR</b>				
Employment (millions)	August	13.7	0.6%	1.6%
Unemployment rate (%)	August	9.4	-0.4†	-0.1†
Participation rate (%)	August	64.8	0.1†	0.1†
Labour income (\$ billion)	June	35.7	0.3%	2.1%
Average weekly earnings (\$)	June	588.87	0.3%	2.8%
<b>INTERNATIONAL TRADE</b>				
Merchandise exports (\$ billion)	July*	22.5	2.1%	13.4%
Merchandise imports (\$ billion)	July*	19.4	3.3%	6.6%
Merchandise trade balance (all figures in \$ billion)	July*	3.1	-0.1	1.5
<b>MANUFACTURING</b>				
Shipments (\$ billion)	July*	34.4	3.0%	7.6%
New orders (\$ billion)	July*	34.6	3.7%	7.3%
Unfilled orders (\$ billion)	July*	34.4	0.7%	-2.6%
Inventory/shipments ratio	July*	1.29	-0.05	-0.11
<b>PRICES</b>				
Consumer price index (1986=100)	August*	135.7	0.1%	1.4%
Industrial product price index (1986=100)	July	128.8	-0.2%	-0.5%
Raw materials price index (1986=100)	July	135.8	0.9%	3.2%
New housing price index (1986=100)	July	131.5	-0.1%	-2.2%

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

\* new this week

† percentage point

## Infomat

### A weekly review

Published by the Communications Division, Statistics Canada, 10-N, R.H. Coats Bldg., Ottawa, Ontario, K1A 0T6.

Editor: Tim Prichard (613) 951-6025

Head of Official Release: Jacques Lefebvre (613) 951-1088

Catalogue: 11-002E. Price: Canada: \$4.00 per issue, \$140.00 per year; United States: US\$5.00 per issue, US\$168.00 per year; Other countries: US\$5.00 per issue, US\$196.00. Canadian customers please add 7% GST.

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