



Infomat

A Weekly Review

Friday, October 25, 1996

OVERVIEW

◆ Robust exports, lower imports make for record trade surplus

Vehicles and agricultural products led exports to new highs in August. This, along with falling imports, resulted in a record trade surplus.

◆ Consumers spend less on goods

Consumer spending on retail goods dipped in August. Overall, retail sales have been sluggish since the beginning of the year.

◆ Wholesalers report surging sales

In August, sales and inventories by wholesalers jumped, following two months of slow growth.

◆ Consumer prices record average rise

The CPI's rise between September 1995 and September 1996 was similar to the annual increases throughout this year.

◆ Composite index grows at steady rate

The growth of the composite index was steady at 0.5% in September, the same as its average monthly increase so far this year.

◆ A first: national survey on child development

According to the first national survey on child development, children are growing up healthy, emotionally well-balanced, and relatively well educated. Nevertheless, many are exposed to several risk factors and life experiences that can seriously affect their subsequent development.

Robust exports, lower imports make for record trade surplus

Record exports and weak imports in August resulted in Canada's largest-ever trade surplus (+\$4.0 billion). Led by vehicles and agricultural products, exports rose 2.7%, reaching a record \$23.2 billion. Shipments to the United States were the strongest. After two months of steady growth, imports fell by 2.7% to \$19.1 billion, with machinery and industrial goods leading the decline. Imports from the United States and the European Union dropped the most.

Exports have followed an upward trend since the second quarter of 1995, reflecting the economic strength of the United States. Imports, by contrast, have remained flat, indicating a weaker domestic market.

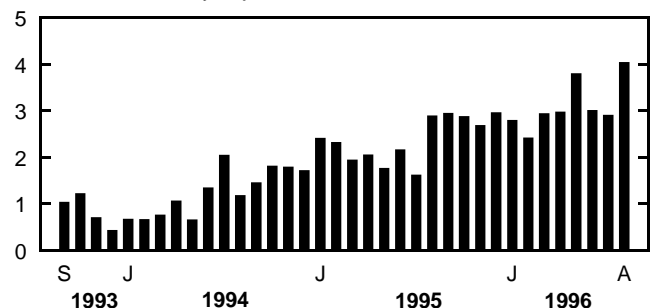
Automotive exports advanced 3.2% in August, bolstered by increased shipments of passenger cars, including minivans. Passenger car exports surged following July shutdowns for vacation and retooling. After substantial declines between April and July, mostly because of dwindling grain stocks, agricultural exports posted a 16.4% increase in August.

Export increases were also recorded by the industrial goods and materials (+3.4%), and the machinery and equipment (+3.1%) sectors. Chemicals and plastics producers led industrial goods

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Trade balance

\$ billions, seasonally adjusted



... Robust exports, lower imports make for record trade surplus

upward. In the machinery and equipment sector, passenger aircraft and rail car gains offset a drop in telecommunications and office machine exports.

Forestry and energy exports lost ground after making gains in July. Declining newsprint exports pulled down forestry products, while a dip in crude oil shipments offset natural gas exports in the energy sector.

A 7.3% drop in industrial goods imports in August reversed the increases of the previous three months. The decline was led by metal ores and chemicals. Machinery and equipment imports slipped to their lowest level since May. Aircraft and other transportation equipment continued to gain momentum, but was offset by reduced imports of communications equipment, special equipment and tools, and industrial machinery.

In automotive products, a sharp decline in parts imports (-14.7%) masked a healthy rise in vehicle imports. As dealers replenished inventories, car and truck imports made a strong comeback after having slowed in June and July. Parts imports

Note to readers

Merchandise trade is only one component of the current account of Canada's balance of payments, which also includes trade in services. In the second quarter of 1996, the overall merchandise trade surplus of \$9.7 billion contrasted with a current account surplus of \$1.1 billion.

dropped as domestic motor vehicle production fell from July's unseasonably high level.

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

Canadian international merchandise trade (65-001-XPB, \$19/\$182) will be available shortly. For further information, contact Suzie Carpentier (613-951-9647 or 1-800-294-5583), International Trade Division. (See also "Current trends" on page 7.)

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, \$36/\$120).

Consumers spend less on goods

Retail sales slipped 0.4% in August to \$17.9 billion, following three consecutive monthly increases. For the first eight months of 1996, retail sales stood only 1.4% higher than in the same period last year. With the effect of price changes removed, they were 0.1% lower. This contrasts with strong exports, which affected sectors such as manufacturing and wholesaling.

So far in 1996, the results have continued the fluctuations of 1995, which yielded little overall growth. By contrast, retail sales grew rapidly (over +6%) in 1994.

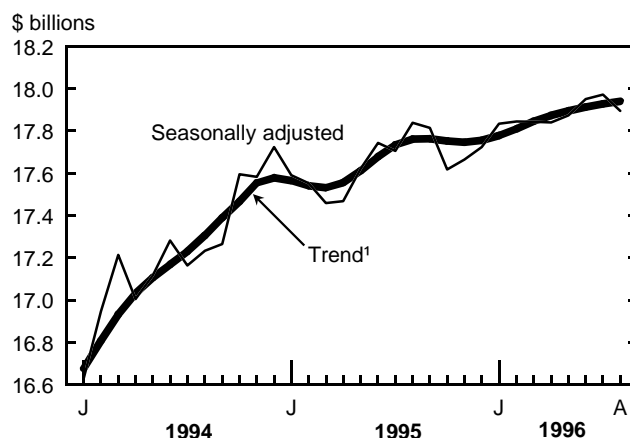
The largest decreases (in dollar terms) in August came from drug (-4.1%) and food stores (-0.4%). Increases in the furniture, automotive and general merchandise sectors limited the decline in total sales.

The August drop in drug store sales followed six straight monthly gains and steady growth seen since April 1995. The decline in food sales coincided with a 0.3% drop in food prices, mostly related to fresh vegetables. Sales by food retailers have been rising in recent months, after generally falling since early 1995.

Furniture retailers gained for the second straight month, continuing the slight upward trend since April. Clothing stores also continued their slight advance, following general declines from May 1995 to January 1996. Automotive sales have levelled off in recent months after increasing since April 1995. General merchandisers have enjoyed steady growth since mid-1993.

In August, six provinces posted increases, led by Saskatchewan (+0.8%), Newfoundland and New Brunswick (+0.6% each). Four provinces and both territories saw declines in retail sales from July.

Retail sales



¹ Trend represents smoothed seasonally adjusted data.

Saskatchewan's retail sales increased 7.1% over the first eight months of 1996 compared with the same period last year. This jump coincided with improved farm performance. New Brunswick retailers were second in sales growth over this period. Only Newfoundland and Ontario showed lower sales in the first eight months of 1996 than during the same period of the previous year.

Among early indications of retail trade for September, trade employment showed a 0.4% decrease in September. Preliminary indications point to a rise in the number of new motor vehicles sold. Retail sales in the United States crept up 0.7% in September after a slight drop in August.

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

The August 1996 issue of **Retail trade** (63-005-XPB, \$20/\$200) will be available shortly. For further information, contact Louise G  n  reux (613-951-3549), Industry Division.

Wholesalers report surging sales

In August, wholesalers' sales and inventories jumped, following two months of sluggish growth. Inventories rose for the second time since the beginning of the year. So far in 1996, sales by wholesalers have increased strongly, mostly driven by the export sectors. These gains have more than offset losses in 1995.

In August, sales by wholesalers totalled \$21.4 billion (+1.5%). Eight of the 11 trade groups, representing about 80% of total sales, recorded increases ranging from 0.1% for food products to 7.4% for computers, packaged software and other electronic machinery.

The two most important advances (in dollar terms) were in computers, packaged software and other electronic machinery (+7.4%), and in the "other products" trade group (+2.6%). The increase in sales of computers and other software, which was much higher than in past years, was attributed to the approaching school year. Sales of certain products in the "other products" category, associated with the beginning of the school year, were also higher.

Total cumulative sales from January to August 1996 were up 2.3% compared with the same period in 1995. Except in Saskatchewan (-6.0%), wholesalers throughout Canada recorded higher sales.

Inventories totalled \$31.5 billion in August, up 1.0% from July, the largest increase in 18 months. This increase contrasts with the downward trend that has been observed since the beginning of the year. Throughout 1994 and 1995, inventories have been on an upward trend. In December 1995, Canadian wholesalers recorded their first decline.

Retail and wholesale trade, August 1996 Seasonally adjusted

	Retail sales		Wholesale sales	
	\$ millions	% change, previous month	\$ millions	% change, previous month
Canada	17,862	-0.4	21,442	1.5
Newfoundland	281	0.6	180	0.4
Prince Edward Island	78	-1.1	48	4.5
Nova Scotia	566	0.3	479	4.8
New Brunswick	452	0.6	290	-2.3
Quebec	4,243	-0.3	4,682	1.1
Ontario	6,421	-1.2	9,354	0.7
Manitoba	653	0.4	772	1.7
Saskatchewan	587	-1.0	710	3.8
Alberta	1,919	0.8	2,070	2.2
British Columbia	2,601	0.1	2,834	3.6
Yukon	22	-3.1	11	-5.6
Northwest Territories	40	-1.0	13	3.5

The rise in inventories came mostly from strong gains (in dollar terms) in motor vehicles, parts and accessories, and "other products". Gains in motor vehicles, parts and accessories (+3.6%) were mostly attributable to the arrival of the new 1997 models. Inventories of "other products" increased strongly for the second month in a row, up 1.9% following a gain of 1.8% in July.

A stronger increase in sales than in inventories caused the inventories-to-sales ratio to decrease from 1.48 to 1.47.

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

*The August 1996 edition of **Wholesale trade** (63-008-XPB, \$18/\$180) will be available shortly. For further information, contact Catherine Mamay (613-951-9683), Industry Division.*

Consumer prices record average rise

Between September 1995 and September 1996, consumers experienced a 1.5% rise in the price of the goods and services contained in the consumer price index's (CPI) basket. Some of the largest contributions to this increase came from new vehicles, gasoline, university tuition fees, telephone services and processed meat. At the same time, large price decreases were reported for mortgage loans, new houses, beef and fresh vegetables. Since January, increases in the CPI from the same month of the previous year have ranged from 1.2% to 1.6%. Between August and September, consumers noted a marginal 0.1% average price rise in their purchases.

University tuition fees jumped by an average 11.8% since last year; they stayed unchanged in Quebec and British Columbia, but jumped 20% in Ontario. One reason is, that in recent years, governments have been picking up a smaller proportion of university funding.

Gasoline prices rose 1.4% between August and September. Crude oil prices moved up in August and again in September in response to renewed tensions between Iraq and the United States. Gasoline prices were 3.7% higher in September 1996 than in September 1995.

Prices of clothing and footwear rose by an average 0.9% in September, with clothing moving up by 0.5%, and footwear, by an

Consumer price index, September 1996 % change, previous year*

	All-items	Food	Energy	Housing	Transportation
Canada	1.5	1.6	2.5	0.0	3.0
Newfoundland	2.0	2.9	1.2	0.7	3.2
Prince Edward Island	1.4	3.1	-1.1	0.1	1.5
Nova Scotia	1.9	2.7	4.8	1.9	2.1
New Brunswick	1.4	1.4	2.7	1.0	2.1
Quebec	1.4	2.5	0.5	0.9	1.2
Ontario	1.3	0.6	1.9	-0.4	3.8
Manitoba	2.3	2.5	3.4	0.5	5.8
Saskatchewan	2.4	2.1	6.5	2.8	4.1
Alberta	2.5	3.2	8.8	0.9	5.0
British Columbia	0.8	0.5	1.9	-2.0	2.5
Whitehorse	1.6	2.4	3.8	0.0	4.5
Yellowknife	1.0	0.2	4.4	0.1	4.5

* Data are not seasonally adjusted.

exceptional 4.4%. The increased price of leather and a rebound from unusually deep summer discounts for women's footwear were mostly responsible.

Food prices fell by 0.3%, as a result of seasonally lower prices for fresh vegetables (-17.1%) and fresh fruit (-3.8%). Lower prices were reported for pork as well. At the same time, higher prices were observed for processed meat, chicken, beef, dairy products, and bakery and cereal products.

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... Consumer prices record average rise

Traveller accommodation charges fell by 5.6% in September, as autumn rates were introduced at some facilities. Air fares dropped by 3.5%, mostly due to seasonally lower fares for many domestic and international routes.

The mortgage interest cost index fell by 0.4%. September marked the tenth month in which this index has declined, reflecting the falling trend of interest rates since the spring of 1995.

Between September 1995 and September 1996, increases in provincial CPIs ranged from a low of 0.8% in British Columbia to a high of 2.5% in Alberta. In British Columbia, declining shelter charges and lower-than-average increases for food, transportation and education contributed to the low rate. Alberta's higher

rate resulted from significant advances in the indexes for transportation, food, household operations and furnishings, and shelter.

Between August and September, provincial CPIs varied from no change in New Brunswick, Quebec and Manitoba to a 0.4% rise in Newfoundland. In the provinces reporting no change, widespread offsetting price movements were observed. In Newfoundland, larger-than-average advances occurred in transportation and education.

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

The September 1996 issue of the Consumer price index (62-001-XPB, \$10/\$100) is now available. For further information, contact Sandra Shadlock (613-951-9606; fax: 613-951-2848; Internet: shadsan@statcan.ca), Prices Division. (See also "Current trends" on page 7.)

Composite index grows at steady rate

The growth of the composite index was steady at 0.5% in September, the same as its average monthly increase so far this year. The sources of growth have shifted, however, from the financial markets to manufacturing, while services have weakened.

Spearheaded by exports and investment goods, manufacturing shipments soared, regaining all of their losses over the previous year. This led to another sharp increase in the ratio of shipments to finished goods. The average workweek fell again, as firms substantially boosted payrolls rather than overtime.

The upturn of the U.S. leading indicator continued in line with economic growth south of the border, as investment strengthened and as housing was up sharply. Household confidence rose as

incomes climbed, while new house sales increased to their best level in 10 years.

Conversely, consumer spending in Canada lagged behind the other components of demand. Since a drop in labour income in July, personal demand for services has slowed steadily, pulling down the overall growth of services employment from a peak of 0.6% to only 0.1% in September. The recovery of both the new and the existing house markets remained slow, while sales of durable goods flattened out.

The financial component inched up. The growth of the stock market accelerated from 0.3% to 0.7%; the money supply also increased.

Available on CANSIM: matrix 191.

The October 1996 issue of Canadian economic observer is now available. For further information, contact Francine Roy (613-951-3627), Current Economic Analysis Group. (See also "Current trends" on page 7.)

A first: national survey on child development

On the whole, the 4.67 million children in Canada under the age of 12 in 1994/95 were growing up healthy, emotionally well-balanced and relatively well-educated. Nevertheless, many children are exposed to several risk factors and life experiences that can seriously affect their subsequent development.

Most children in Canada under the age of 4 had normal or above average motor and social development. However, 14.7% of children (203,804) scored lower on the motor and social development scale than the average children in their age group. Of the several factors that could explain slower motor and social development is the gestation age of the child at birth: children born prematurely were 1.6 times more likely to experience slower motor and social development than those who were not. Low birth weight infants were 2.3 times more likely to experience the same difficulties.

Vocabulary development, a good predictor of success during the first years at school, may be influenced by certain characteristics of the immediate family. The survey results indicated that 4- and 5-year-old children who come from a dysfunctional family were 2.3 times more likely to experience slow vocabulary development than those in functional families. Similarly, children whose

Note to readers

The data in this article come from the National Longitudinal Survey of Children and Youth (NLSCY), conducted by Statistics Canada on behalf of Human Resources Development Canada. The survey addresses the information gap on children in Canada and their development, particularly the lack of information on children over time.

The first phase of data collection took place in 1994/95. Information was collected on 22,831 children aged 11 and under. The same children will be tracked at two-year intervals into adulthood. The survey studies developmental changes occurring in children, the influence of a child's social environment, and various family-related factors.

mother showed symptoms of depression were 2.2 times more likely to have problems with vocabulary development. Hyperactivity also seemed to delay vocabulary development. Hyperactive children were 1.7 times as likely to experience vocabulary problems.

Aggressive behaviour becomes less common, on average, as children approach adolescence. Eight aspects of aggression were examined, including physical aggression such as a child destroying

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... A first: national survey on child development

his or her own things, threatening, being cruel, or striking others. Also examined was indirect aggression, such as a child saying bad things about someone, rejecting others from the group, or revealing private matters. Of these eight aspects of aggression, seven were displayed less by 8- to 11-year-olds than by 4- to 7-year-olds. While physical aggression tends to decrease as children grow up, indirect aggression tends to persist.

More than 14.6% of children under age 12 lived in a lone-parent family headed by a woman. One in six of these children had some form of conduct disorder and about one in nine had repeated a grade at school. In all, 41% of children in female lone-parent families had at least one kind of problem identified in the survey, compared with 26% of children in all families.

In addition, a child with a single mother was 1.5 to 2 times more likely to face various types of problems, compared with children in a two-parent family, whether the families were poor or not. Therefore, while poverty may exacerbate the problems faced by children in single-parent families, it is not the only factor that causes them problems. The survey found, for example, that having a hostile parent was far more disadvantageous to the formation of a child's relationships and to social behaviour than any aspect of a family's background.

Positive interaction with the parents yielded a significant advantage across several features of the child's development. In fact, a child's developmental prospects were, in most respects, at least as good with positive parenting in a disadvantaged family, as with negative parenting in a less disadvantaged family.

Socio-economic characteristics

In 1994, 83% of children under 12 lived in a two-parent family, 16.5% lived with a lone parent, and 0.5% lived with someone other than a parent.

Among two-parent families, 35.5% had both parents in the labour market full-time; 21.8% lived in families where one parent was employed full-time and the other parent was not in paid employment; about 2.9% were in families in which both parents worked part-time or one worked part-time and one was not employed; and only 6.6% lived in homes where neither parent was employed. In lone-parent families, 54.9% of children lived with a parent who was not employed at all.

About 28% of children lived in a household with total income under \$30,000 a year. Another 42% were in a household with income between \$30,000 and \$59,000; and 39% lived in a household with income of at least \$60,000 a year.

Growing up in Canada (89-550-MPE, \$25) will be available in November. For further information, contact Gilles Montigny (613-951-9731), Special Surveys Division.

New from Statistics Canada

Focus on culture

Autumn 1996

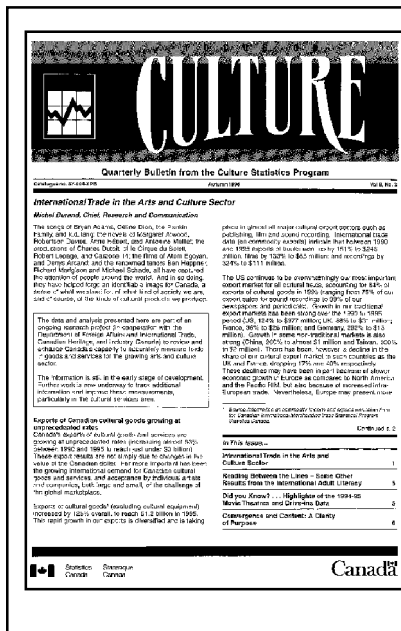
The lead article in the Autumn 1996 issue of the quarterly bulletin, *Focus on culture*, provides new data and analysis of Canada's balance-of-payments position with respect to cultural goods and services. Although our bookstores, newsstands, record shops, cinemas and television screens still testify to Canada's position as one of the largest importers of cultural products in the world, data indicate that between 1990 and 1995 exports grew substantially, from only one-third of imports to fully one-half.

A data table from the 1994 International Adult Literacy Survey provides the percentage of Canadians following such cultural pursuits as using a public library, reading books, listening to the radio, tapes, CDs, etc., or attending a movie, play or concert.

The edited text of a speech given at the March 1996 OECD-sponsored symposium on "New social and economic approaches to a multimedia world" presents another view of where the information society may be moving, and where and how we should be influencing its content.

Some highlights of the 1994/95 data on movie theatres and drive-ins are also given.

The Autumn 1996 (vol. 8, no. 3) issue of *Focus on culture* (87-004-XPB, \$8/\$26) is now available. For further information, contact Mary Cromie (613-951-6864), Culture Statistics Program.



New from Statistics Canada – Continued

RRSP contributions

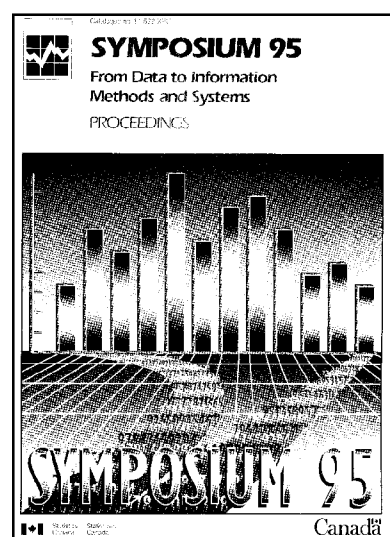
1995

The 1995 edition of the databank on registered retirement savings plan (RRSP) contributions is now available. Today's release looks at RRSP contributions reported by Canadians on their 1995 personal income tax forms.

Produced annually, these data are a unique source of information on small areas and are ideal for supporting market analyses and policy decisions. The data are available for provinces and territories, cities, towns, census metropolitan areas and census divisions, as well as forward sortation areas (the first three characters of postal codes) and letter carrier walks (groupings of postal codes).

Demographic and financial data will be of particular interest to researchers, policy planners, financial institutions and marketers.

For further information, contact Client Services (613-951-9720; fax: 613-951-4745; Internet: saadinfo@statcan.ca), Small Area and Administrative Data Division.



Proceedings of Symposium 95: From data to information—methods and systems

Symposium 95, held in November 1995, was the 12th in the series of international symposia on methodological issues sponsored by Statistics Canada.

Each year the symposium focusses on a particular theme. In 1995, the emphasis was on the analysis and dissemination stages in the information development processes. A total of 29 presentations, all invited, were made by academic and government statisticians, specialists in information processing and information management, data vendors and end users.

The proceedings reproduce the papers as submitted by the authors. Abstracts of these papers will soon be available on the World Wide Web.

The proceedings (11-522-XPE, \$53) are now available. For further information, or to order this document, contact John Kovar, Business Survey Methods Division (613-951-8615; fax: 613-951-1462; Internet: kovar@statcan.ca).

Historical statistical supplement 1995/96 on diskette: An electronic format for the *Canadian economic observer*

The annual *Historical statistical supplement* to the *Canadian economic observer* is now available in an electronic format. The *CEO* is a quick, concise and authoritative overview of the economy, and is often the source of reports on economic conditions. The *Historical supplement* is an annual companion volume to the monthly reports. It is a collection of 45 tables organized in nine subject categories such as national accounts, labour markets, prices, financial markets and U.S. economic indicators, and containing historical annual series, which correspond to those published in the monthly *CEO* tables. Along with current data for 1995/96 are some data that go as far back as 1926.

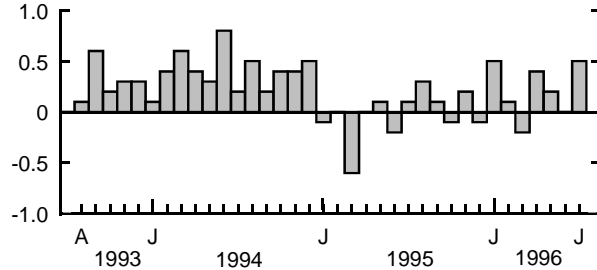
For your convenience, the *Historical statistical supplement 1995/96* on diskette now contains a wide range of tables and graphs on the principal economic indicators for Canada and the provinces and the United States. Packaged with this bilingual product are the English and French versions of Adobe Acrobat Reader, a Windows-based browsing software, which has been modified by Statistics Canada for a seamless presentation of the *Historical supplement*'s collection of data. Acrobat lets you view and print information, as well as export data and graphics into other software applications. It includes a complete help-text to guide you through the various available functions. Additional assistance can be obtained from the Current Economic Analysis Group.

The Historical statistical supplement 1995/96 (11-210-XDB, Canada: \$50; United States: US\$60; other countries: US\$70) is now available on diskette. For further information, or to order a set of diskettes, contact Cyndi Bloskie (613-951-3634) or Francine Roy (613-951-3627), Current Economic Analysis Group (fax: 613-951-5403; Internet: ceo@statcan.ca).

Current trends

Gross domestic product

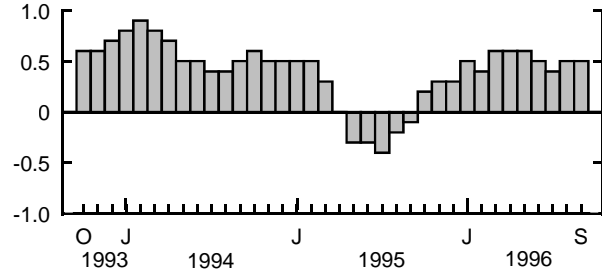
% change,
previous month



Real gross domestic product at factor cost increased 0.5% between June and July.

Composite index

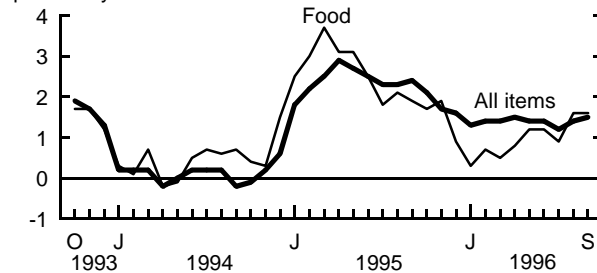
% change,
previous month



The composite index grew by 0.5% between August and September.

Consumer price index

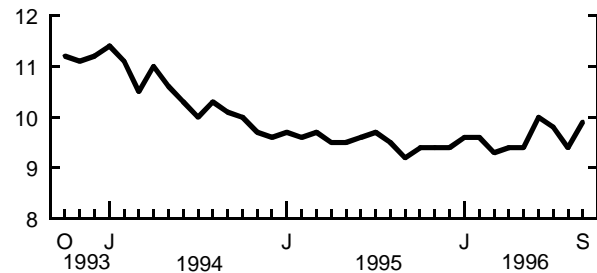
% change,
previous year



Consumers paid 1.5% more for goods and services in September 1996 than the year before. Food prices rose by 1.6%.

Unemployment rate

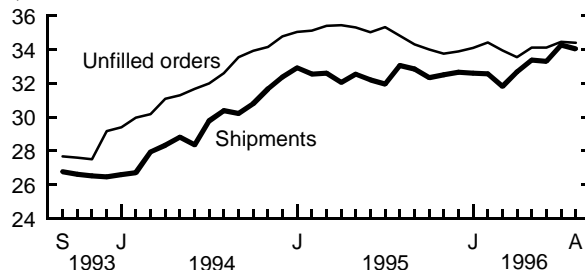
%



In September, the unemployment rate climbed 0.5 percentage points to 9.9%.

Manufacturing

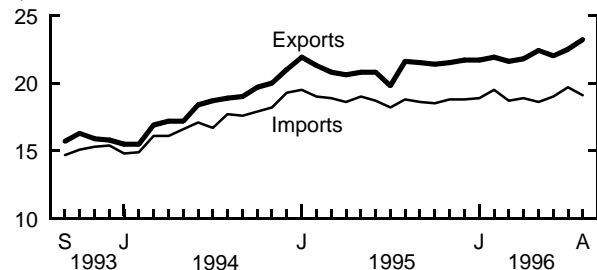
\$ billions



Manufacturers' shipments slipped 0.7% in August to \$34.0 billion. The level of unfilled orders fell 0.2% to \$34.4 billion.

Merchandise trade

\$ billions



In August, the value of merchandise exports rose 2.7% from July to \$23.2 billion. Imports fell 2.7% to \$19.1 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)	July	551.3	0.5%	1.9%
Composite index (1981=100)	September*	180.6	0.5%	5.4%
Operating profits of enterprises (\$ billion)	Q2 1996	22.1	-1.6%	-6.4%
Capacity utilization (%)	Q2 1996	82.7	0.3†	-0.9†
DOMESTIC DEMAND				
Retail trade (\$ billion)	August*	17.9	-0.4%	0.3%
New motor vehicle sales ('000 units)	August	97.3	0.7%	-3.3%
LABOUR				
Employment (millions)	September	13.7	-0.3%	1.0%
Unemployment rate (%)	September	9.9	0.5†	0.7†
Participation rate (%)	September	64.8	0.0†	0.2†
Labour income (\$ billion)	June	35.7	0.3%	2.1%
Average weekly earnings (\$)	July	584.85	-0.7%	2.4%
INTERNATIONAL TRADE				
Merchandise exports (\$ billion)	August*	23.2	2.7%	7.0%
Merchandise imports (\$ billion)	August*	19.1	-2.7%	1.9%
Merchandise trade balance (all figures in \$ billion)	August*	4.0	1.1	1.1
MANUFACTURING				
Shipments (\$ billion)	August	34.0	-0.7%	3.0%
New orders (\$ billion)	August	34.0	-1.8%	4.4%
Unfilled orders (\$ billion)	August	34.4	-0.2%	-1.2%
Inventory/shipments ratio	August	1.31	0.01	-0.05
PRICES				
Consumer price index (1986=100)	September*	135.9	0.1%	1.5%
Industrial product price index (1986=100)	August	129.3	0.4%	0.1%
Raw materials price index (1986=100)	August	137.9	1.3%	5.7%
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

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A weekly review

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