



Infomat

A Weekly Review

Friday, November 22, 1996

OVERVIEW

◆ Imports surge to record levels

Exports advanced 1.7% in September, bolstered by energy products and machinery. Imports, meanwhile, surged 4.6% to a record level, narrowing the trade surplus from August.

◆ Inflation rate climbs from year before

The CPI increased by 1.8% between October 1995 and October 1996, up from the 1.5% annual inflation rate posted in September. The rise was due to higher annual increases for natural gas, gasoline and food.

◆ Shipments bounce back

Manufacturing shipments bounced back in September, regaining the ground lost in August and extending the upward trend that has characterized the last six months.

◆ Growth of composite index picks up slightly

The growth of the leading indicator picked up slightly to 0.6% in October, equal to its average monthly increase so far this year.

◆ Canadians make fewer trips, host fewer visitors

In September, fewer people visited Canada, including a large drop in American overnight visitors. As well, fewer Canadians took trips to the United States or overseas.

◆ Food processing industry grows steadily

The food processing industry has grown slowly but steadily over the past five years.

Imports surge to record levels

Exports advanced to a record \$23.5 billion in September (+1.7%), growing for a third consecutive month. Fueled by robust sales of energy products and machinery, September's increase helped boost third-quarter exports by 4.8% over second-quarter levels. While shipments to most major trading partners increased in September, U.S.-bound exports accounted for the bulk of the gain in the third-quarter.

After losing ground in August, imports surged 4.6% in September, advancing to a record \$20.3 billion on strong purchases of machinery and industrial goods. Shipments from all trading partners increased, except the European Union. Following a period of prolonged flatness, imports have been increasing in recent months. During the third quarter, imports moved ahead by 4.8%, after slipping 0.8% in the second quarter.

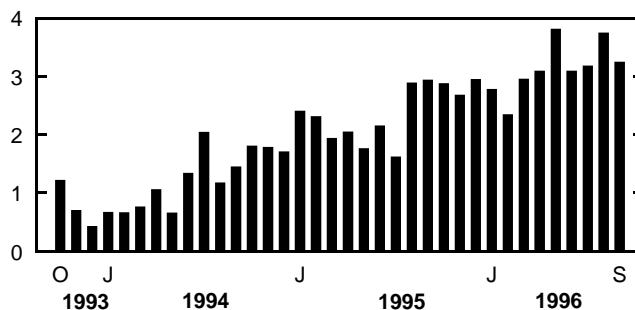
The faster pace of growth on the imports side reduced Canada's trade surplus to \$3.2 billion in September. Easing back from August's level of \$3.7 billion, the second highest ever, the trade balance was influenced mainly by weaker surpluses with the United States and Japan.

Energy exports climbed 9.7% in September, propelled by resurgent shipments of coal and crude oil, and continued strength in refined petroleum products. Exports of crude oil grew mostly because of increasing prices, in part reflecting concern over low

(continued on page 2)

Trade balance

\$ billions, seasonally adjusted



... Imports surge to record levels

heating oil reserves in the United States. For natural gas, a growth plateau in the first half of the year gave way to an upward trend in the third quarter, bolstered in part by rising prices. The machinery sector's 3.3% growth in September was due to higher sales of telecommunications equipment, industrial machinery, and office machines. Further gains in September came from agricultural exports, industrial goods and forestry products. Automotive products fell in September, but increased overall in the third quarter.

Much of September's import strength was due to the machinery and equipment sector (+6.2%), where across-the-board increases were recorded. Gains were most notable for communications equipment and office machines, which collectively account for 38% of machinery purchases. Widespread increases were also seen for imports of industrial goods and materials imports (+3.8%). Gains in the range of 3%-10% were typical for goods such as chemicals, plastics, textiles, and other fabricated materials. Up a collective 4.8% in the third quarter, many of these goods are used as inputs by Canada's manufacturers. Imports of automotive products and consumer goods both gained ground in September.

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, the 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.

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 8.)

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).

Inflation rate climbs from year before

Consumers paid 1.8% more in October 1996 than they did a year earlier for the basket of goods and services making up the consumer price index (CPI). Consumers faced the most significant increases when paying for energy, food, new vehicles, post-secondary education and telephone services. In contrast, homeowners spent considerably less on mortgage interest charges. Prices were also lower for new houses and computer equipment.

October's annual increase followed a 1.5% rise in September. The jump between the September and October annual inflation rates was due to higher annual increases for natural gas (due mainly to a special levy in Ontario), gasoline and food. Excluding food and energy, the October rate was a moderate 1.3%, up slightly from September's 1.2%, which was the lowest rate in that series this year.

Between September and October, consumer prices rose an average 0.2%, mostly as a result of higher energy and food prices. September's price increase followed weaker price changes in each of the previous four months.

Energy costs advanced by 2.1% in October, due principally to higher charges for natural gas. Food prices rose an average 0.6%. Grocery shoppers saw prices increase 0.8% overall (with rises in fresh vegetable, fresh fruit, bakery products, dairy products and beef prices), while those eating out faced a smaller price increase of 0.3%. The overall advance was larger than average for this time of year.

Property taxes showed a 1.2% average rise across the country. Increases in such taxes have remained below 2% for the last three years, the smallest advances in two decades. The clothing index advanced for a fourth consecutive month. Most of the increase came from men's wear and children's wear. Prices of toys and games and sporting equipment showed unusually strong advances for this time of year. Tickets to the theatre and to hockey games also cost more.

The increase in the CPI was partly offset by declines in traveller accommodation charges (as autumn rates were introduced in some facilities), mortgage interest charges, auto insurance premiums and household furnishings prices.

Between October 1995 and October 1996, increases in provincial CPIs ranged from a low of 0.8% in British Columbia to a high of 2.7% in Nova Scotia. The small advance in British Columbia was explained largely by smaller-than-average increases in three indexes (transportation; food; and household operations and furnishings) combined with a sharp decline in shelter costs. The latter was influenced, to a considerable extent, by drops in the prices of new houses and natural gas. The large advance in Nova Scotia resulted mainly from above-average increases in food prices and shelter charges.

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The Consumer price index, October 1996
% change, previous year*

Province/ territory	All- items	Food	Energy	Housing	Transportation
Canada	1.8	2.1	5.9	0.5	3.5
Newfoundland	2.3	3.1	3.2	1.3	3.6
Prince Edward Island	1.3	2.2	-1.1	0.0	1.5
Nova Scotia	2.7	4.3	7.2	2.9	2.4
New Brunswick	2.2	2.3	6.9	2.7	2.7
Quebec	2.0	3.3	5.4	0.8	3.2
Ontario	1.8	1.1	7.4	0.7	4.0
Manitoba	2.6	2.7	3.7	0.8	5.9
Saskatchewan	2.4	1.7	7.7	3.3	4.6
Alberta	2.3	3.7	6.4	0.9	4.1
British Columbia	0.8	1.3	1.6	-2.1	2.4
Whitehorse	1.9	2.2	5.2	-0.1	5.0
Yellowknife	1.3	1.7	3.1	0.0	4.8

* Data are not seasonally adjusted.

... Inflation rate climbs from year before

Between September and October 1996, changes in the provincial CPIs varied from a 0.2% drop in Alberta to a 0.7% climb in New Brunswick. In Alberta, five of the eight major components fell, with the largest impact resulting from declines in the recreation, education and reading index (primarily traveller accommodation charges) and the transportation index (largely gasoline prices). In New Brunswick, above-average increases were observed in the shelter, and in the clothing and footwear index.

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

The October 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 8.)

Shipments bounce back

Manufacturing shipments bounced back 0.8% in September, regaining the ground lost in August and extending the upward trend that has characterized the last six months. Shipments were flat throughout 1995, following strong growth in 1994.

Inventories were up for a second month in a row, signalling that the downward adjustments observed recently may have ended. Unfilled orders fell again, as manufacturers depleted their existing backlogs.

Shipments increased in 14 of 22 major industry groups, which accounted for just over 60% of total shipments. The largest gain came from the electrical and electronic products industry (+7.3%), but growth was also recorded in the motor vehicle 2.3%, and refined petroleum and coal product industries (+3.8%). These increases were partly offset by declines in the food (-2.5%) and chemical (-2.1%) industries.

After falling 2.3% from April to July, inventories rose 0.4% in September to \$44.8 billion. Though small, this increase is the second in a row and indicates that recent drops may have been sufficient to bring inventories in line with shipments. The advance came mainly from the refined petroleum and coal, wood, and aircraft and parts industries. Declines in the electrical and electronic parts and motor vehicle parts and accessories industries partly offset these gains.

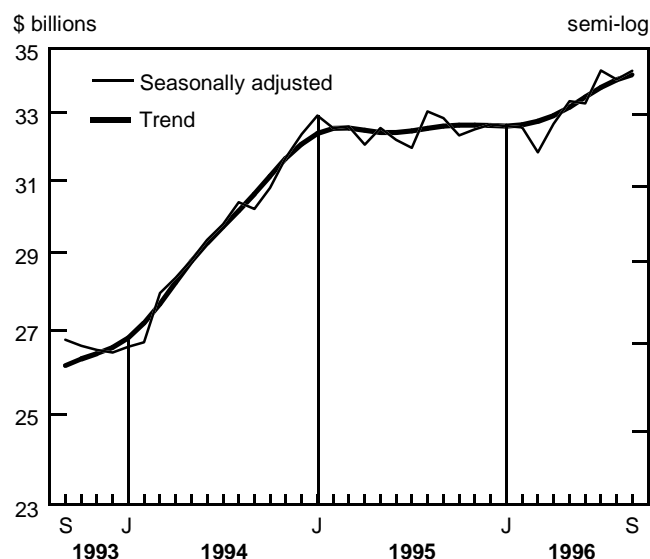
September's increases in both inventories and shipments left the inventories-to-shipments ratio unchanged at 1.31. After outpacing shipments throughout most of 1995, inventories have contracted moderately in recent months as shipments have taken off. September's level was close to the historic low of December

Note to readers

Unfilled orders are a stock of orders which will contribute to future shipments, assuming they are not cancelled.

New orders represent orders received, whether they are 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



1994 (1.28), and significantly below the relatively high level reached in March 1996 (1.43).

Manufacturers' backlog of unfilled orders, a key determinant of future shipments, fell 1.2% to \$33.7 billion in September. After weakening significantly in the latter part of 1995, the level of unfilled orders has stabilized, but without showing any sustained upward momentum. Large decreases were recorded in the aircraft and parts (-3.7%) and the electrical and electronic parts (-3.1%) industries. The only significant offsetting increase occurred in the machinery (+3.8%) industry.

New orders rose by 0.1% to \$33.9 billion.

Available on CANSIM: matrices 9550-9579 and 9581-9593.

The September 1996 issue of *Monthly Survey of Manufacturing* (31-001-XPB, \$19/\$190) will be available shortly. For further information, contact Henry Glouchkow (613-951-9833), or Robert Traversy (613-951-9497), Industry Division. (See also "Current trends" on page 8.)

Manufacturers' shipments, September 1996

Seasonally adjusted

	\$ millions	% change, previous month
Canada	34,285	0.8
Newfoundland	117	-24.5
Prince Edward Island	52	-10.5
Nova Scotia	526	5.1
New Brunswick	660	0.7
Quebec	8,196	1.4
Ontario	18,137	1.4
Manitoba	783	1.2
Saskatchewan	433	-2.7
Alberta	2,580	-2.0
British Columbia	2,797	-1.2
Yukon and NWT	4	12.9

Growth of composite index picks up slightly

The growth of the leading indicator picked up slightly from 0.5% to 0.6% in October, equal to its average monthly increase so far this year. Gains remained largely confined to financial markets and manufacturing. Household demand trailed behind the other components of spending, reflecting continued weakness in incomes and confidence.

Manufacturing continued to be one of the principal sectors of growth, as exports remained vigorous. New orders for durable goods posted their fastest gain in over a year. The ratio of shipments to stocks of finished goods increased for a fourth straight month, while the average workweek snapped out of two months of declines.

In Canada, household demand slumped again, failing to sustain the advances made earlier this year. Durable goods sales dropped, while services employment was dragged down by a slump in the personal sector. Housing starts fell in October,

checking the overall growth of the housing index as existing home sales rose.

The financial markets posted broad and large advances, among the best ever recorded. The stock market rose 1.6% to a new record in October, while interest rates tumbled across the spectrum.

In the United States, a slowdown in the growth of the leading index suggests that the third quarter moderation in GDP may continue. Buoyant household incomes and confidence should support growth, but any increase in sales is likely to be met in the short-term from inventories, which accounted for virtually all of the growth in GDP in the third quarter.

Available on CANSIM: matrix 191.

The November 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 in electronic format. For further information, please contact Francine Roy (613-951-3627), Current Economic Analysis Group. (See also "Current trends" on page 8.)

Canadians make fewer trips, host fewer visitors

In September, fewer people made overnight trips to Canada. The number of overnight trips by Americans fell 8.6% compared with August. The number of overnight trips by Canadians abroad or to the United States dropped 0.5% from August. The monthly drop in American overnight travellers is the largest in 11 years.

Travel between Canada and other countries, September 1996

	'000	% change, previous month	'000	% change, previous year
	seasonally adjusted		unadjusted	
Canadian trips abroad				
Auto trips to the United States				
Same day	2,910	-4.1	2,959	-6.2
One or more nights	789	-3.1	859	-3.0
Total trips, one or more nights				
United States ¹	1,223	-0.5	1,270	0.6
Other countries	294	-0.7	271	-0.6
Travel to Canada				
Auto trips from the United States				
Same day	1,898	-1.9	2,010	-4.3
One or more nights	592	-17.9	715	-20.1
Total trips, one or more nights				
United States ¹	985	-8.6	1,189	-14.5
Other countries ²	364	-0.7	546	6.3

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

² Figures for other countries exclude same-day entries by land only, via the United States.

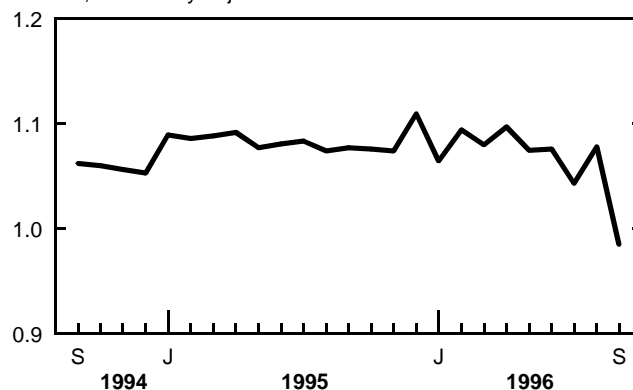
Note to readers

Month-to-month comparisons use seasonally adjusted data, while year-over-year comparisons use unadjusted data (the actual traffic counts).

Overseas countries are countries other than the United States. Excursions are same-day trips.

Overnight trips to Canada by Americans

Millions, seasonally adjusted



The number of overseas travellers visiting Canada (-0.7%) fell for a third consecutive month since peaking in June. The trend has generally been upward since early 1995. Overall, foreigners made 1.3 million trips to Canada of at least one night, up 6.6% from August.

Canadians also made fewer overnight trips abroad (-0.5%) in September. Since February, when Canadians made 1.6 million trips, this type of travel has dropped 7.1% to 1.5 million. Overnight stays in the United States fell 0.5% in September to 1.2 million.

(continued on page 5)

... Canadians make fewer trips, host fewer visitors

Overseas trips continued their slide from a five-year peak of 308,000 in February, declining 4.5% to 294,000.

Same-day car trips to the United States dropped 4.1% to 2.9 million in September, remaining near the level they stabilized at in April 1994. American same-day cross-border trips declined 1.9% to 1.9 million. Since February, Americans have made 100,000 fewer same-day monthly excursions.

Available on CANSIM: matrices 2661-2697, 5780-6046 and 8200-8328.

The September 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), Education, Culture and Tourism Division.

Food processing industry grows steadily

The food processing industry has grown slowly but steadily over the past five years. In 1995, food processors produced a total \$43.2 billion worth of products for domestic and foreign markets, a 12% increase since 1990.

Between 1990 and 1995, shipments of vegetable oil, specifically canola oil, recorded the strongest gains, rising 51% to \$1.2 billion in 1995. Shipments of processed fruits and vegetables reached \$4.1 billion in 1995, up 26% from 1990. Companies manufactured almost \$5 billion in snack foods in 1995, up 22.1% from five years earlier.

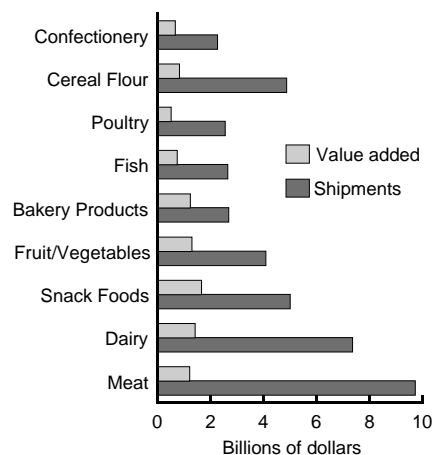
Processors of meat and meat products (except poultry) recorded \$9.7 billion in shipments, the largest segment of the food processing industry. However, the cumulative increase over the five-year period was only 8.5%, one of the lowest. Between 1990 and 1995, the value of shipments by Canadian fish processors remained almost unchanged at \$2.6 billion, despite higher prices, a consequence of declining fish stocks rather than any change in consumer demand.

Shipments by dairies fell almost 2.5% over the five years, reflecting a smaller proportion of children and teenagers in the population, and the increased popularity of imported cheeses and other dairy products, among other factors.

On balance, Canada exports about the same value of processed food products as it imports. In 1995, food processors exported \$8.2 billion worth of products, a 54.7% increase from 1990, while imports totalled about \$8.1 billion, up almost 61%. Almost all sectors of the food products industry recorded increases in exports between 1990 and 1995. Processors exported \$718 million worth of meat products in 1995, the largest single export in value terms, up 50% from five years earlier.

More than 62% of food exports are destined for the United States, Canada's largest single export market. Following the signing of the Canada-U.S. free trade agreement, exports to the United States rose 76% between 1990 and 1995. North American, Japanese and South East Asian markets were the best growth areas for food product exports during the five-year period. China has become a growing market. While sales of \$112 million to China represented only 1.4% of Canada's overall exports in 1995, this was a 1,500% increase from 1990.

Shipments and value added
- food industry, 1995



Imports of processed food products have grown steadily since 1990. The largest increases were in imports from the United States, which totalled \$5.0 billion in 1995, up 79% from five years earlier. Significant increases also occurred in food imports from the European Union (EU). On the other hand, Canada lost export markets in the EU following the 1990-91 recession.

In 1995, the food industry employed almost 184,000 people, equivalent to 10% of total manufacturing sector employment. It ranks as Canada's third largest manufacturing industry. Overall, total employment fell 7% between 1990 and 1995. Hardest hit was Atlantic Canada, where 8,600 jobs were lost (-35%) in the food industry. Employment was highest in the meat and poultry products sector, followed by the bakery products sector. Ontario, which accounted for 42% of all food industry shipments in 1995, had the most employees, followed by Quebec with 23% of shipments.

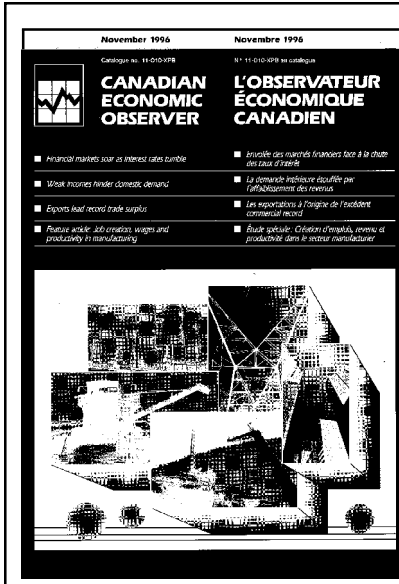
Canada's food processing industry (15-515-MPE, \$18) is now available. To order, contact the Statistics Canada Regional Reference Centre nearest you, or order via the Internet (order@statcan.ca). For further information, contact Fred Wong (613-951-2994; Internet: frewong@statcan.ca), Business and Trade Statistics Field.

(continued on page 6)

Exports and imports by the food processing industry
 1990-1995

	Exports			Imports		
	1990	1995	1990-1995	1990	1995	1990-1995
	\$ millions		% change	\$ millions		% change
Meat	1,432	2,150	50.1	788	1,056	34.0
Poultry	20	63	215.0	140	233	66.4
Fish	2,134	2,096	-1.8	618	1,185	91.7
Fruits and vegetables	228	515	125.9	895	1,292	44.4
Dairy	202	268	32.7	164	310	89.0
Flour, cereal and feed	324	628	93.8	286	602	110.5
Vegetable oil (except corn oil)	115	374	225.2	194	309	59.3
Bakery products	162	417	157.4	188	375	99.5
Sugar and confectionery	206	504	144.7	745	1,009	35.4
Other food products	495	1,211	144.6	1,054	1,789	69.7
Total	5,318	8,226	54.7	5,072	8,160	60.9

New from Statistics Canada



Canadian economic observer

November 1996

The November 1996 issue of *Canadian economic observer*, Statistics Canada's flagship publication for economic statistics, carries a monthly summary of current economic events and conditions, as well as a feature article titled "Job creation, wages and productivity in manufacturing."

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 November 1996 issue of *Canadian economic observer* (11-010-XPB, \$22/\$220) is now available. For further information, contact Francine Roy (613-951-3627; Internet:

Growing up in Canada

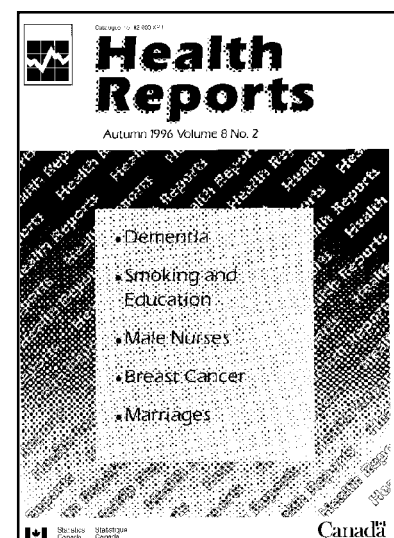
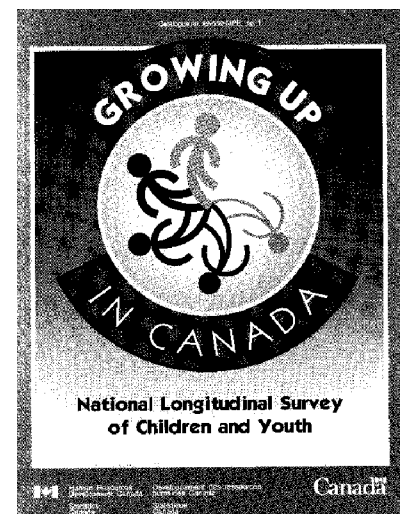
1994-95

Statistics Canada, along with Human Resources Development Canada, has released the publication *Growing up in Canada*, which contains analyses of data from the National Longitudinal Survey of Children and Youth.

This joint undertaking is an important step in learning more about how our children are developing today, and what we can do to prepare them for the challenges of tomorrow. The survey is a long-term research program that will track a large sample of children over many years, enabling researchers to monitor children's well-being and development.

This report contains several of the first analyses of the survey's data. It presents the findings and conclusions of studies undertaken by several experts on child development. The studies illustrate the richness and diversity of the database, the analytic potential of which will grow enormously in years to come, as further survey cycles are completed.

Growing up in Canada (89-550-MPE, \$25) is now available. For further information on this release, contact Gilles Montigny (613-951-9731), Special Surveys Division.



Health reports

Autumn 1996

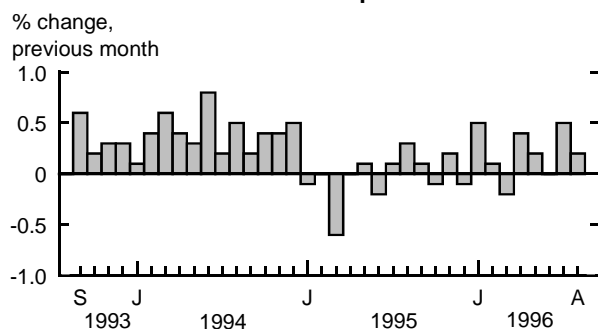
The Autumn issue of *Health reports* contains articles entitled "Reaching smokers with lower educational attainment," "Dementia among seniors," "Male registered nurses, 1995," "Twenty years of marriages," and "Trends in breast cancer incidence and mortality."

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 Autumn 1996 issue of *Health reports*, vol. 8, no. 2 (82-003-XPB, \$34/\$112) is now available. For further information, contact Mary Sue Devereaux (613-951-4381), Jason Siroonian (613-951-4377), or Client Custom Services (613-951-1746), Health Statistics Division.

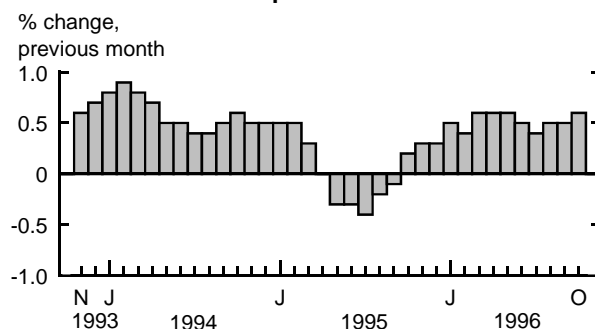
Current trends

Gross domestic product



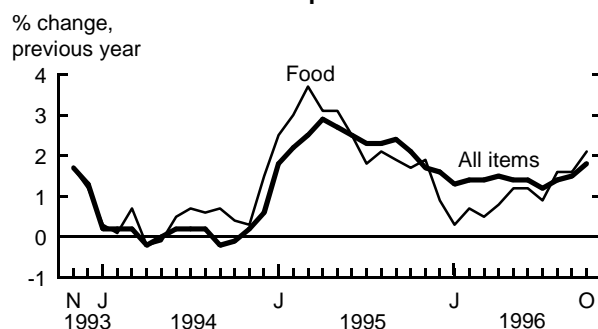
Real gross domestic product at factor cost increased 0.2% between July and August.

Composite index



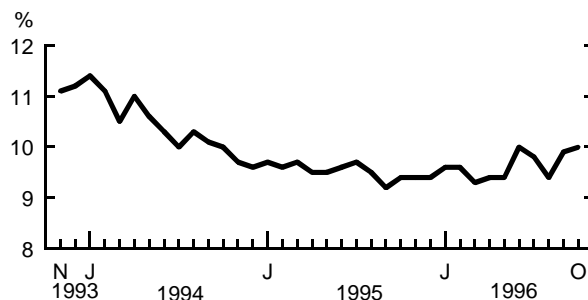
The composite index grew by 0.6% between September and October.

Consumer price index



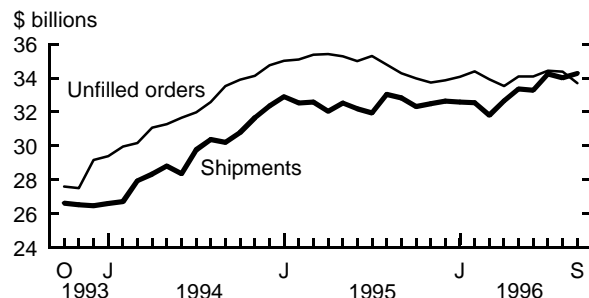
Consumers paid 1.8% more for goods and services in September 1996 than the year before. Food prices rose by 2.1%.

Unemployment rate



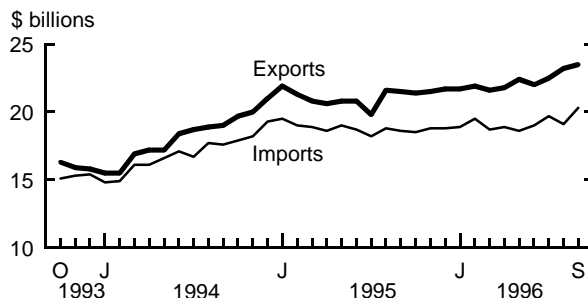
In October, the unemployment rate climbed 0.1 percentage points to 10.0%.

Manufacturing



Manufacturers' shipments bounced back 0.8% in September to \$34.3 billion. The level of unfilled orders fell 1.2% to \$33.7 billion.

Merchandise trade



In September, the value of merchandise exports rose 1.7% from August to \$23.5 billion. Imports surged 4.6% to \$20.3 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)	August	552.0	0.2%	1.7%
Composite index (1981=100)	October*	181.7	0.6%	5.8%
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)	September	98.8	1.1%	-5.3%
LABOUR				
Employment (millions)	October	13.7	0.3%	1.2%
Unemployment rate (%)	October	10.0	0.1†	0.6†
Participation rate (%)	October	65.0	0.2†	0.2†
Labour income (\$ billion)	June	35.7	0.3%	2.1%
Average weekly earnings (\$)	August	590.16	0.3%	2.6%
INTERNATIONAL TRADE				
Merchandise exports (\$ billion)	September*	23.5	1.7%	9.4%
Merchandise imports (\$ billion)	September*	20.3	4.6%	9.3%
Merchandise trade balance (all figures in \$ billion)	September*	3.2	-0.5	0.3
MANUFACTURING				
Shipments (\$ billion)	September*	34.3	0.8%	4.4%
New orders (\$ billion)	September*	33.9	0.1%	4.8%
Unfilled orders (\$ billion)	September*	33.7	-1.2%	-1.7%
Inventory/shipments ratio	September*	1.31	0.00	-0.06
PRICES				
Consumer price index (1986=100)	October*	136.2	0.2%	1.8%
Industrial product price index (1986=100)	September	129.7	0.2%	0.0%
Raw materials price index (1986=100)	September	139.8	1.5%	9.0%
New housing price index (1986=100)	August	131.5	0.0%	-2.0%

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

* new this week

† percentage point

Infomat

A weekly review

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