



# The Daily

Statistics Canada

**Tuesday, September 29, 1998**

For release at 8:30 a.m.

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## MAJOR RELEASES

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- **Industrial Product Price Index, August, 1998**

In August, industrial product prices rose 0.5% compared with July as the value of the Canadian dollar continued to decline. The 12-month change in prices dropped slightly to 0.1%.

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  - **Raw Materials Price Index, August 1998**

Manufacturers paid slightly less for their raw materials in August compared with July. Overall raw material prices declined 0.7% as lower prices for crude oil and grains were partly offset by higher wood prices.

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## MAJOR RELEASES

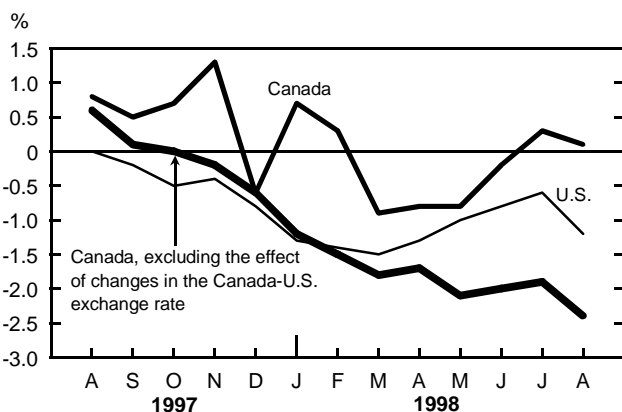
### Industrial Product Price Index

August, 1998 (preliminary)

In August, industrial product prices rose 0.5% compared with July as the value of the Canadian dollar continued to decline. The 12-month change in prices dropped slightly to 0.1%. The Industrial Product Price Index was 120.1 (1992=100) in August, up from 119.5 in July.

The most significant price increases were for exported automobiles and trucks and softwood lumber. Prices declined for petroleum products and primary products of the major non-ferrous metals.

**12-month change in manufacturing prices down in Canada and the United States**



### Exchange rate effects significant in August

In mid-August, the value of the U.S. dollar had risen to about \$C1.52 from about \$C1.48 in mid-July. In mid-August 1997, it had been about C\$1.39.

If the effect of the changes in the Canada-U.S. exchange rate is excluded for export prices quoted in U.S. dollars, the price level would have edged down 0.1% from July and the 12-month change would have been -2.4%.

### 12-month change for non-food consumer goods prices negative for Canadian manufacturers and consumers

At the retail level, prices for consumer goods, excluding food purchased from stores, were down 0.4%

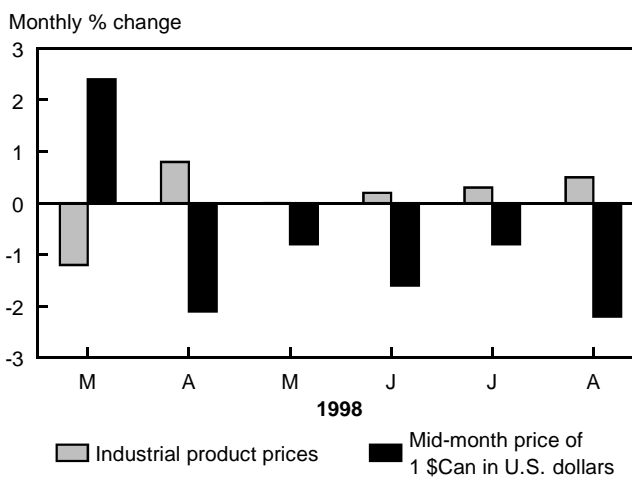
#### Note to readers

The Industrial Product Price Index (IPPI) reflects the prices that producers in Canada receive as the goods leave the plant gate. It does not reflect what the consumer pays. Unlike the Consumer Price Index (CPI), the IPPI excludes indirect taxes and all the costs that occur between the time when a good leaves the plant and the time when the final user takes possession of it, including the transportation, wholesale, and retail costs.

from a year earlier (based on the Consumer Price Index).

For manufacturers, the 12-month change in prices for finished goods, other than capital goods or foods and feeds, was 3.2%. However, this increase was basically due to the effect of the exchange rate on the prices of exported goods quoted in U.S. dollars. If this effect was removed, the change would have been -0.7%.

### Industrial product prices rising as value of Canadian dollar declines



### 12-month change in manufacturing industry prices down in Canada and the United States

In the United States, manufacturers saw their overall price level drop 0.2% in August to stand 1.1% lower than a year earlier. The 12-month change in July had been -0.6%.

In Canada, the 12-month change in manufacturing prices fell from 0.3% in July to 0.1% in August. In addition, if the effect of the Canada-United States

exchange rate was removed, the 12-month change in prices declined from -1.9% in July to -2.4% in August.

### Prices up for motor vehicles and softwood lumber

The increase in motor vehicle prices in August was mainly due to the effect of the rise in the value of the U.S. dollar in terms of the Canadian dollar. Export prices for automobiles and trucks were both up 2.3%. However, domestic prices for automobiles edged down 0.2%, while those for trucks edged up 0.2%. The decline in domestic automobile prices reflected minor changes in manufacturers incentive programs to encourage vehicle sales.

Softwood lumber prices increased (+5.3%) for a second consecutive month in August, but remained 10.0% lower than a year earlier. Prices were up across the country, with domestic prices advancing 3.3% and export prices gaining 6.1%.

In August, Canadian housing starts jumped 11.7% with the end of the construction strike in Ontario. Housing starts in the United States have also been strong, reaching an 11-year high in July.

Several factors in British Columbia also contributed to higher lumber prices in August, including the threat of a rail strike, forest fires, and the extended summer shutdowns of some coast mills.

### Prices down for petroleum products and non-ferrous primary metal products

The price level for the refined petroleum product industries continued to decline in August (-1.6%). Since January 1997, prices in this industry have dropped 27.7%. Crude oil prices also continued to decline in August and have fallen 41.5% since the peak in December 1996.

Prices for primary products of the major non-ferrous metals moved slightly lower in August, reflecting the continuing weakness in the market for these products. Aluminum (-2.5%), nickel (-3.0%), and copper and copper alloy products (-1.2%) also registered price declines. Prices moved lower for all the precious metals. Prices were down 0.9% for gold and gold alloys in primary forms and 2.0% for silver refinery shapes and platinum.

The prices of goods used as inputs into the production of finished goods have declined compared with the same period last year. Manufacturers of goods used as inputs (intermediate goods) saw appreciably lower prices than a year ago (-2.0%). This was particularly the case for the prices of goods used as inputs into basic industries (-7.4%). Basic industries

are defined here as the primary metal, wood and pulp, and some chemical industries.

The notable drop in prices of goods used as inputs into basic industries also reflected the much lower prices for raw materials than a year ago (-15.8%).

### 12-month price changes August 1997 to August 1998

	Total	Excluding exchange rate effect
	% change	
<b>Manufacturers prices</b>		
All goods	0.1	-2.4
Intermediate goods (used as inputs into industry)	-2.0	-3.9
First stage goods (used as inputs into basic industries)	-7.4	-10.0
Second stage goods (used as inputs into other industries)	-1.0	-2.8
<b>Finished goods</b>	<b>3.2</b>	<b>0.0</b>
Foods and feeds	0.6	0.5
Capital goods	5.5	1.3
Other finished goods	3.2	-0.7
<b>Other prices</b>		
Raw material prices (RMPI)	-15.8	...
Retail prices (CPI)		
Food purchased from stores	1.2	...
Other consumer goods	-0.4	...
U.S. manufacturers' prices	-1.1	...

... Figures not appropriate or not applicable.

### Overview

In Canada, seasonally adjusted total employment continued to increase in August. The increases in July and August have more than offset the declines in May and June. However, employment in manufacturing continued to decline in August — despite the conclusion of the General Motors strike at the end of July. Manufacturing shipments, excluding the automotive sector, had fallen 0.4% in July. At the same time, however, retail sales recovered from most of their June decline.

As noted earlier, the end of the Ontario construction strike saw a steep increase in Canadian housing starts. Housing resales in August showed little change for a third consecutive month.

In the United States (Canada's major trading partner) industrial production rose 1.7% and more than made up for the declines in June and July.

However, industrial production, excluding the motor vehicle sector, was only up 0.1%. Non-agricultural

payrolls were up somewhat but the unemployment rate remained unchanged at 4.5%. August housing starts were down somewhat from their July peak, but remained much higher than a year earlier. Residential building permits, though, were up from their July level.

In Japan (Canada's second largest national export market) monthly industrial production declined in July to stand 9.3% below its level a year earlier. The 12-month change in Japanese domestic wholesale prices was -2.1% in August, little changed from its July figure.

Economic conditions remain poor in many Asian countries. According to the most recent statistics, industrial production was down from a year earlier in Japan, Malaysia, Singapore, South Korea, Thailand and the Philippines.

Collectively the European Union is an even larger export market for Canada than Japan. For the four European G7 members which dominate the union, the most recent figures for the 12-month change in industrial prices were +0.5% in the United Kingdom

(August), +0.3% in Italy (July), -0.4% in Germany (July) and -0.7% in France (June).

In July, German industrial production was down somewhat after an increase in June, but remained higher than in April or May. In the United Kingdom, industrial production continued to edge up in July but was below its April level. In Italy, industrial production was up in July, both from June and from a year earlier. In France, industrial production was down slightly in June after its May increase.

**Available on CANSIM: matrices 1870-1878.**

The August 1998 issue of *Industry price indexes* (62-011-XPB, \$22/\$217) will be available at the end of October. See *How to order publications*.

For further information, or to enquire about the concepts, methods and data quality of this release, contact the Client Services Unit (613-951-3350; fax: 613-951-2848; [infounit@statcan.ca](mailto:infounit@statcan.ca)), Prices Division. □

**Industrial product price indexes**  
(1992=100)

	Relative importance	Aug. 1997	July 1998 <sup>r</sup>	Aug. 1998 <sup>p</sup>	Aug. 1997 to Aug. 1998	July to Aug. 1998
					% change	
<b>Industrial Product Price Index (IPPI)</b>	<b>100.00</b>	<b>120.0</b>	<b>119.5</b>	<b>120.1</b>	<b>0.1</b>	<b>0.5</b>
<b>Intermediate goods<sup>1</sup></b>	<b>59.28</b>	<b>122.5</b>	<b>119.6</b>	<b>120.1</b>	<b>-2.0</b>	<b>0.4</b>
First-stage intermediate goods <sup>2</sup>	7.91	128.6	120.4	119.1	-7.4	-1.1
Second-stage intermediate goods <sup>3</sup>	51.37	121.5	119.5	120.3	-1.0	0.7
<b>Finished goods<sup>4</sup></b>	<b>40.72</b>	<b>116.4</b>	<b>119.2</b>	<b>120.1</b>	<b>3.2</b>	<b>0.8</b>
Finished foods and feeds	10.38	112.0	112.4	112.7	0.6	0.3
Capital equipment	10.21	118.2	123.3	124.7	5.5	1.1
All other finished goods	20.13	117.8	120.7	121.6	3.2	0.7
<b>Aggregation by commodities</b>						
Meat, fish and dairy products	7.27	121.4	118.4	119.2	-1.8	0.7
Fruit, vegetable, feed, miscellaneous food products	6.72	114.7	113.0	112.3	-2.1	-0.6
Beverages	2.12	110.3	112.1	112.3	1.8	0.2
Tobacco and tobacco products	0.72	127.3	131.6	131.6	3.4	0.0
Rubber, leather, plastic fabric products	3.01	113.7	113.4	113.6	-0.1	0.2
Textile products	1.82	109.5	110.1	110.3	0.7	0.2
Knitted products and clothing	1.93	108.1	109.5	109.6	1.4	0.1
Lumber, sawmill, other wood products	5.20	145.0	135.2	140.9	-2.8	4.2
Furniture and fixtures	1.46	113.9	115.3	115.3	1.2	0.0
Pulp and paper products	7.65	126.5	131.6	131.8	4.2	0.2
Printing and publishing	3.05	126.8	131.5	132.0	4.1	0.4
Primary metal products	7.58	129.3	121.3	120.3	-7.0	-0.8
Metal fabricated products	4.11	119.9	123.2	123.4	2.9	0.2
Machinery and equipment	4.08	111.4	112.9	113.3	1.7	0.4
Autos, trucks, other transportation equipment	18.76	121.7	130.2	132.4	8.8	1.7
Electrical and communications products	6.03	106.7	106.3	107.0	0.3	0.7
Non-metallic mineral products	2.12	111.2	112.5	112.6	1.3	0.1
Petroleum and coal products <sup>5</sup>	6.01	115.9	94.0	92.5	-20.2	-1.6
Chemicals and chemical products	7.60	117.2	113.9	113.6	-3.1	-0.3
Miscellaneous manufactured products	2.45	115.1	117.2	117.4	2.0	0.2
Miscellaneous non-manufactured commodities	0.31	126.8	116.6	117.1	-7.6	0.4

<sup>r</sup> Revised figures.

<sup>p</sup> Preliminary figures.

<sup>1</sup> Intermediate goods are used principally to produce other goods.

<sup>2</sup> First-stage intermediate goods are used most frequently to produce other intermediate goods.

<sup>3</sup> Second-stage intermediate goods are most commonly used to produce final goods.

<sup>4</sup> Finished goods are most commonly used for immediate consumption or for capital investment.

<sup>5</sup> This index is estimated for the current month.



## Raw Materials Price Index

August 1998 (preliminary)

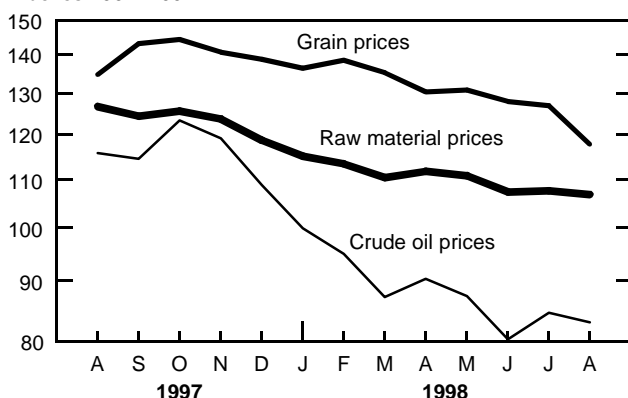
Manufacturers paid slightly less for their raw materials in August compared with July. Overall raw material prices declined 0.7% as lower prices for crude oil and grains were partly offset by higher wood prices. Raw material prices have been on a downward trend since early 1997 and have returned to levels last seen during the first quarter of 1994.

The Raw Materials Price Index stood at 106.6 in August (1992=100), down from 107.4 in July (revised). Compared with 12 months earlier, raw material prices in August were down 15.8%. Lower prices for crude oil, wood, non-ferrous metals and animal and vegetable products were the major contributors to the 12-month change.

Raw material prices excluding mineral fuels, (90% of which is crude oil), were down 0.3%, and the 12-month change registered went from -12.4% in July to -11.7% in August.

### Crude oil and grain pushing down raw material prices

Indexes 1992=100



### Crude oil prices down in August

Crude oil prices fell 1.9% in August. This was the sixth monthly decline since the beginning of the year, and prices have fallen 16.8% over this period. Compared with August 1997, crude oil prices were down 28.2%.

Falling crude oil prices in August remained partly due to the faltering demand in Asia and the perspective, at least for the near future, that the world is well supplied with crude oil. Oil producers are currently pumping almost 4% more oil than the world requires. Also, the recent devaluation of the rouble increased

#### Note to readers

The Raw Materials Price Index (RMPI) reflects the prices paid by Canadian manufacturers for key raw materials. Many of these prices are set in a world market. Also, unlike the Industrial Product Price Index, the RMPI includes goods that are not produced in Canada.

expectations that Russia would boost oil exports — adding to the existing global glut of oil. Russia is the world's third-largest producer of crude oil and any significant increase in exports could seriously offset OPEC's continuing plan to cut output.

In the mineral fuels group, other than crude oil, natural gas prices were up 16.0% compared with August 1997. Coal prices were down 3.8% over the same period.

### Log supply down

Wood prices edged up 1.3% in August due to higher prices for logs (+1.0%) and pulpwood (+2.3%). Compared with 12 months earlier, wood prices were down 14.5%. Lower prices for logs (-18.6%), partly offset by higher pulpwood prices (+2.0%), were responsible for the decline in wood prices. Log prices in August were subject to an element of under-supply. Forest fire dangers in British Columbia made it difficult for mills to replenish their log supplies. Also, the relatively strong U.S. lumber market assisted the upward movement in log prices. The recent increase in China's imports of pulp could signal greater pulp demand and possibly higher pulpwood prices in the future.

### Vegetable product prices down

On a month-to-month basis, vegetable product prices fell 2.8% in August. Lower prices for grains (-7.3%) and oilseeds (-5.1%) were the major contributors to the decline. The Canadian Wheat Board dropped the asking export price of wheat to its lowest level since August 1992. Canada, France and Argentina are all expecting bumper wheat crops. As well, soybean prices were down 8.7% with the news that U.S. farmers will harvest a record crop later this year, boosting present ample supplies at a time of slumping exports. Canola prices, however, have fared much better. Since August 1997, canola prices were only down 2.7% compared with a 20.3% decline for soybeans. In the first half of 1998, canola was virtually the only major crop in Canada to bring producers more revenue. Also, depending on the condition of China's

oilseed harvests, canola prices could strengthen in the near future.

Compared with 12 months earlier, vegetable product prices were down 12.8%. Lower prices for coffee (-43.4%), grains (-12.8%) and oilseeds (-8.8%) were somewhat offset by higher prices for potatoes (+39.2%).

### **Hog prices down again**

Animals and animal product prices edged down 0.3% in August compared with July. Lower prices for hogs (-1.0%), the major contributor to the decline, was almost offset by higher prices for cattle and calves for slaughter (+0.6%). Compared with 12 months ago, prices were down 8.9% for the animals and animal product group. Lower prices for hogs (-32.6%) and cattle and calves for slaughter (-3.6%) were somewhat offset by higher prices for molluscs and crustaceans (+22.3%). Hog prices continue to decline due to excess supply. Large producers expanding their herds, and weak Asian demand caused this oversupply. Domestic demand has not taken up the excess supply from falling exports partly because retail prices have not kept pace with the decline in live hog prices. For instance, fresh and frozen pork prices (as noted in the Consumer Price Index) have declined only 8.3% since August 1997.

### **New technology for nickel concentrates**

Non-ferrous metal prices dipped slightly in August (-0.3%). Lower prices for copper concentrates (-2.4%) and nickel concentrates (-2.3%) in August were marginally offset by higher prices for aluminum materials (+0.6%). Compared with the same period

last year, non-ferrous metal prices were down 17.0%. Lower prices for copper concentrates (-19.6%), nickel concentrates (-34.2%) and aluminum materials (-19.4%) were somewhat offset by higher prices for silver, platinum and lead. The continued weak demand for metals from Asia and the moderating growth in the United States have dampened price increases for non-ferrous metals. Nickel prices have also been subject to increased exports from Russia, partly due to the devaluation of Russia's currency. Also a new low-cost process using leach technology, applicable to almost two-thirds of the world's known resources for nickel ores, may potentially lower nickel prices.

Ferrous material prices were down 1.2% in August compared with the previous month. Lower prices for iron and steel scrap (-3.5%) were partly offset by higher prices for iron ore (+2.3%). Compared with 12 months earlier, ferrous material prices remained almost unchanged this August. Higher iron ore prices (+9.3) were almost offset by lower prices for iron and steel scrap (-5.1%). The abundant supply of iron and steel scrap in the market place has kept prices from increasing.

### **Available on CANSIM: matrices 1879.**

The August 1998 issue of *Industry price indexes* (62-011-XPB, \$22/\$217) will be available at the end of October. See *How to order publications*.

For further information, or to enquire about the concepts, methods and data quality of this release, contact the Client Services Unit (613-951-3350; fax (613-951-2848; [infounit@statcan.ca](mailto:infounit@statcan.ca)), Prices Division. □

# **Raw Materials Price Index** (1992 =100)

	Relative importance	Aug. 1997	July 1998 <sup>r</sup>	Aug. 1998 <sup>p</sup>	Aug. 1997 to Aug. 1998	July to Aug. 1998
					% change	
<b>Raw Materials Price Index (RMPI)</b>	<b>100.00</b>	<b>126.6</b>	<b>107.4</b>	<b>106.6</b>	<b>-15.8</b>	<b>-0.7</b>
Mineral fuels	31.47	114.6	86.4	84.9	-25.9	-1.7
Vegetable products	9.41	145.0	130.1	126.4	-12.8	-2.8
Animals and animal products	24.41	117.5	107.3	107.0	-8.9	-0.3
Wood	14.88	152.3	128.5	130.2	-14.5	1.3
Ferrous materials	3.17	134.6	136.9	135.3	0.5	-1.2
Non-ferrous metals	13.81	130.9	108.9	108.6	-17.0	-0.3
Non-metallic minerals	2.85	112.1	114.4	114.4	2.1	0.0
<b>RMPI excluding mineral fuels</b>	<b>68.53</b>	<b>132.1</b>	<b>117.0</b>	<b>116.6</b>	<b>-11.7</b>	<b>-0.3</b>

<sup>r</sup> Revised figures.

<sup>p</sup> Preliminary figures.





## OTHER RELEASES

### Crude oil and natural gas

July 1998

Crude oil production was 0.7% higher in July compared with the same month a year earlier. This was the 14th consecutive monthly year-over-year increase. Exports, which accounted for 59.8% of total production, continued their upward trend, increasing 11.6% from a year earlier and 18.5% higher than in 1996. Exports, still driven by strong demand in the United States, have been increasing steadily for 26 consecutive months. Year-to-date exports of crude oil were up 17.3% over the same period in 1997.

Following five consecutive monthly year-over-year increases, imports of crude oil fell 22.2% compared with July 1997.

Natural gas production increased 2.7% from July 1997. Canadian domestic sales continued dropping with a 2.6% decrease in July. This was the ninth consecutive monthly year-over-year decline in total natural gas sales. However, exports which accounted for 59.2% of total production, posted a 17.1% increase in July. This was the 13th consecutive monthly year-over-year increase in natural gas exports.

Year-to-date exports of natural gas were up 7.5% over the same period in 1997. Year-to-date Canadian sales were down 7.5% from the year earlier level, as a result of unseasonably mild temperatures during the 1997/98 heating season.

### Crude oil and natural gas

	July 1997	July 1998	July 1997 to July 1998
	thousands of cubic metres		% change
<b>Crude oil and equivalent hydrocarbons<sup>1</sup></b>			
Production	10,834.5	10,911.0	0.7
Exports	5,842.5	6,521.6	11.6
Imports <sup>2</sup>	4,079.8	3,174.5	-22.2
Refinery receipts	8,625.6	7,601.6	-11.9
	millions of cubic metres		% change
<b>Natural gas<sup>3</sup></b>			
Marketable production	12,477.1	12,817.9	2.7
Exports	6,474.0	7,581.2	17.1
Canadian domestic sales <sup>4</sup>	3,577.5	3,485.4	-2.6
	Jan. 1997 to July 1997	Jan. 1998 to July 1998	Jan.-July 1997 to Jan.- July 1998
	thousands of cubic metres		% change
<b>Crude oil and equivalent hydrocarbons<sup>1</sup></b>			
Production	69,825.6	74,928.5	7.3
Exports	39,282.4	46,078.1	17.3
Imports <sup>2</sup>	25,162.0	25,410.9	1.0
Refinery receipts	54,831.5	54,550.8	-0.5
	millions of cubic metres		% change
<b>Natural gas<sup>3</sup></b>			
Marketable production	90,611.4	93,127.4	2.8
Exports	47,041.9	50,547.8	7.5
Canadian domestic sales <sup>4</sup>	41,490.4	38,373.9	-7.5

<sup>1</sup> Disposition may differ from production due to inventory change, industry own-use, etc.

<sup>2</sup> Crude oil received by Canadian refineries from foreign countries for processing. Data may differ from International Trade Division (ITD) estimates due to timing differences and the inclusion of crude oil landed in Canada for future re-export in the ITD data.

<sup>3</sup> Disposition may differ from production due to inventory change, usage as pipeline fuel, pipeline losses, line-pack fluctuations, etc.

<sup>4</sup> Includes direct sales.

**Available on CANSIM: matrices 530-539.**

The July 1998 issue of *Crude petroleum and natural gas production* (26-006-XPB, \$19/\$186) will be available in October. See *How to order publications*.

For further information, or to enquire about the concepts, methods and data quality of this release, contact Eleonore Harding (613-951-5708; [hardele@statcan.ca](mailto:hardele@statcan.ca)), Energy Section, Manufacturing, Construction and Energy Division. ■

## **Telephone statistics**

July 1998

Canada's 14 major telephone systems reported monthly revenues of \$1,473.2 million in July, a 3.5% increase from July 1997. Operating expenses were \$1,083.5 million, down 1.0% from July 1997. Net operating revenue totalled \$389.7 million, an 18.1% increase from July 1997.

**Available on CANSIM: matrix 355.**

The July 1998 issue of *Telephone statistics* (56-002-XIB, \$8/\$70) is now available on the Internet. See *How to order publications*.

For further information on this release, contact Haig McCarrell (613-951-5948), Science and Technology Redesign Project. ■

## **Amusement and recreational services and personal and household services**

1995

Results from surveys on amusement and recreational services and personal and household services are now available.

**Available on CANSIM: matrix 41 and 42.**

For further information, or to enquire about the concepts, methods and data quality of this release, contact Daniel Salois (613-951-0379; [salodan@statcan.ca](mailto:salodan@statcan.ca); fax: 613-951-6696), Arts, Entertainment, Recreation, Health and Education Section, Services Division. ■

## PUBLICATIONS RELEASED

**Mineral wool including fibrous glass insulation,**  
August 1998  
**Catalogue number 44-004-XPB**  
(Canada: \$7/\$62; outside Canada: US\$7/US\$62).

**Telephone statistics, July 1998**  
**Catalogue number 56-002-XIB**  
(Canada: \$8/\$70; outside Canada: US\$8/US\$70).

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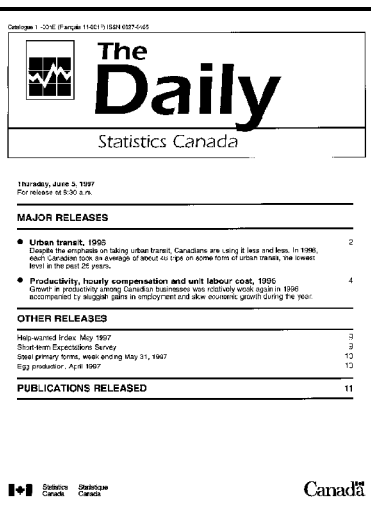
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Editor: Duncan Currie (613-951-1103, [currdun@statcan.ca](mailto:currdun@statcan.ca))

Head of Official Release: Chantal Prévost (613-951-1088, [prevcha@statcan.ca](mailto:prevcha@statcan.ca))

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