



# IN·F·O·M·A·T

A WEEKLY REVIEW

Friday, April 5, 1991

## OVERVIEW

### ■ Leading Indicator: Decline Accelerates

In January, the composite leading indicator fell by 1.0%, the steepest drop since the indicator started declining twelve months ago.

### ■ Sharp Drop in GDP

Real Gross Domestic Product at factor cost dropped by 0.9% in January. This was the sharpest monthly drop since the start of the recession.

### ■ CPI Remains Unchanged

After a large increase in January following the introduction of the GST, the all-items CPI for Canada remained unchanged in February.

### ■ Non-residents Continue Substantial Investment in Canadian Securities

In January, non-residents invested substantially (\$1.9 billion) in Canadian securities, mainly with unusually high new bond purchases.

### ■ Building Permits: Lowest Value in Five Years

In January, the preliminary value of building permits decreased by 3.9% to \$1.8 billion, the lowest level in five years. This continued the declining trend started in mid-1989.

### ■ Help-wanted Index Maintains Downward Trend

The Help-wanted Index for Canada declined by 2.6% in March, maintaining the downward trend started in April 1989.

### ■ Wholesale Sales Continue to Decline

After adjustment for the replacement of the Federal Sales Tax with the GST, seasonally adjusted wholesale merchants' sales decreased by 4.0% in January.

### ■ Retail Trade: Largest Decline in Seven Years

After adjustment for the replacement of the Federal Sales Tax by the GST (see note), retail sales declined by 3.5% in January, the largest monthly drop in over seven years.

This issue also includes information on employment, earnings and hours, industrial product and raw material prices, and unemployment insurance statistics.

## Leading Indicator: Decline Accelerates

In January, the composite leading indicator declined by 1.0%, the steepest drop since the indicator started declining twelve months ago. All its ten components were down.

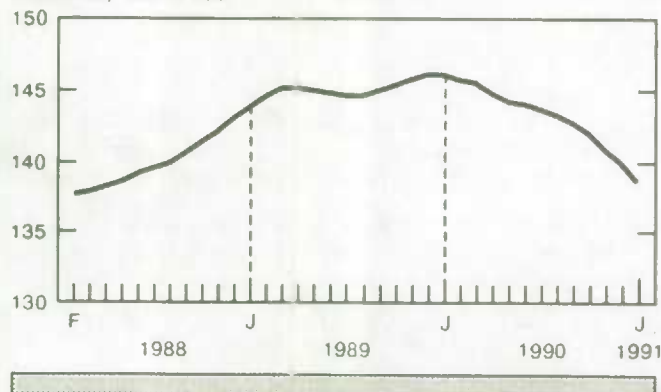
The indicators of household demand registered sharp declines. The decline in the housing component accelerated from 2.6% in December to 3.8% in January, nearly matching the largest declines recorded last summer. Both housing starts and house sales fell sharply. These drops, together with sharply-higher prices linked to the introduction of the GST, led to the steepest monthly drop in furniture and appliance sales since October 1981. Sales of other durable goods continued to drop and the rate of decline of employment in services remained high at 0.5%.

The decline in new orders for durable goods continued to accelerate, notably for automobiles and construction materials. The 3.2% drop for new orders was the largest in over ten years. Shipments continued to fall more rapidly than inventories, leading to another drop in the ratio of

(continued on page 2)

### Composite Leading Indicator

Smoothed, 1981 = 100



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### ... Leading Indicator: Decline Accelerates

shipments to stocks of finished goods. The average work-week decreased by 0.3%, for the fourth straight month.

The TSE 300 index fell steadily, while real money supply was down marginally. The rate of decline of the U.S. leading index eased from 0.8% in

December to 0.7% in January. These rates of decline are slightly less than at the trough of the 1981-1982 recession.

For further information, order the *Canadian Economic Observer* (catalogue number 11-010) or contact the Current Analysis Section at (613) 951-3627.

## Sharp Drop in GDP

Real Gross Domestic Product at factor cost dropped by 0.9% in January. This was the sharpest drop since the start of the recession.

Output in services declined by 1.1%, the steepest decline since October 1982. Retail trade dropped 5.3% when, with the introduction of the GST, consumer prices rose by 2.9% relative to December. Wholesale trade fell 5.7%, after rising 1.7% in December.

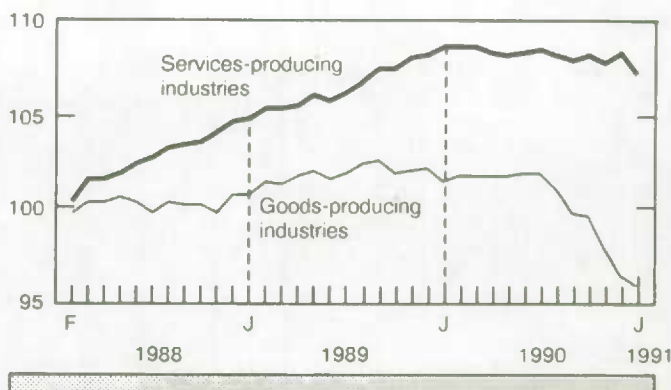
Although wholesale and retail trade accounted for more than 80% of the drop in services output, community, business and personal services and transportation and storage also contributed to the decline. In contrast, communications finance, insurance and real estate industries registered gains.

Goods production continued to drop for the seventh consecutive month, but at a slower pace (-0.6%) than in the two previous months. Agricultural output declined 3.0% and forestry output fell 8.5%, to a level 46% below the July 1987 peak. Manufacturing output continued to fall (-0.7%), and this contributed to a cumulative drop of 11.2% from the May 1989 peak. But the January slowdown in manufacturing was not as sharp nor as widespread as in the two previous months.

Production of wood products dropped by 6.9% to a level 32% below the peak registered in October

### Output by Sector

January 1988 = 100



1987. Output in the construction sector fell 1.8%, after a sharper drop in December.

Public utilities registered a gain of 3.9%, particularly in the electric energy sector which posted its sharpest gain in over one year. Gains were also registered in the mining and fishing sectors.

For further information, order *Real Gross Domestic Product by Industry* (catalogue number 15-001) or contact *Industry Measures and Analysis Division* at (613) 951-9164.

## CPI Remains Unchanged

After a large increase in January following the introduction of the Goods and Service Tax and other tax changes, the all-items Consumer Price Index for Canada remained unchanged in February.

The major upward pressure came from a 2.7% increase in prices for clothing, which was attributable to two factors: the end of January sales, including promotions in which some retailers had absorbed the GST, and higher prices on new stock.

The recreation, reading and education component rose 0.9%, as a result of seasonally higher rates for travel tours, the end of sales for ski equipment as well as higher prices for several magazines and newspapers.

The transportation component fell by 2.0%, largely as a result of a decline in gasoline prices (-9.8%), the largest in nearly five years.

The housing component declined slightly (-0.1%) reflecting several offsetting price movements. After a 4.1% increase in January, the food component remained unchanged. Higher prices for food purchased from restaurants offset a decline in prices for food purchased from stores. The health and personal care component was also unchanged.

The year-over year increase in the all-items CPI was 6.2%, down from 6.8% in January. But this rate of increase was well above the 4.8% annual average in 1990.

For further information, order *Consumer Price Index* (catalogue number 62-001) or contact *Prices Division* at (613) 951-3353.

(continued on page 3)



## PROVINCIAL PERSPECTIVES: CONSUMER PRICES\*

Percentage change, February 1991/1990

Province	All-items	Food	Energy	All items excluding Food and Energy	Housing
<b>Canada</b>	<b>6.2</b>	<b>5.0</b>	<b>10.9</b>	<b>6.0</b>	<b>5.3</b>
Newfoundland	6.4	6.5	21.2	4.5	6.7
Prince Edward Island	9.2	6.8	32.5	7.0	9.7
Nova Scotia	7.7	6.5	25.6	6.0	7.0
New Brunswick	7.3	6.1	21.8	5.7	8.3
Québec	7.8	3.1	15.8	8.2	7.1
Ontario	5.1	4.5	9.4	4.8	3.9
Manitoba	6.1	5.5	11.5	5.7	5.7
Saskatchewan	5.0	6.9	2.4	4.9	4.3
Alberta	6.5	8.0	0.7	6.7	6.8
British Columbia	6.7	8.6	9.2	5.8	4.5

\* Data are not seasonally adjusted.

### Non-residents Continue Substantial Investment in Canadian Securities

In January, non residents invested substantially once again in Canadian securities. The \$1.9 billion investment resulted from unusually high new bond issues, which were partly offset by disinvestments in the money market and in stocks.

New bond sales to non-residents, at \$3.3 billion, approached the record high established in December 1986. Led by provinces and their enterprises who returned to the market after a one-month absence, Canadian borrowers placed bonds directly in foreign markets. American investors purchased just under one-half of new bonds. A small disinvestment was registered in the secondary market.

After investing a large \$1.7 billion in the Canadian money market in December, non-residents made a small disinvestment in January. Purchases of Government of Canada treasury bills (a net \$0.8 billion) were offset by sales of \$1 billion of all other money market paper. As during most of 1990, non-residents were net sellers of Canadian stocks (\$0.4 billion). Some three-quarters of the disinvestment was by American residents.

Canadian residents sold, on a net basis \$263 million of foreign bonds, a reversal from their net purchases in December. Residents also made a net

### Security Transactions

Net sales to non residents	Sept.	Oct.	Nov.	Dec.	Jan.
	millions of dollars				
<b>Canadian Securities</b>					
Bonds	0.8	2.3	2.6	0.1	2.5
Common and preferred stocks	-0.3	-0.7	-0.4	-0.2	-0.4
Money market paper	-0.3	0.3	-0.2	1.7	-0.2
<b>Total</b>	<b>0.3</b>	<b>1.9</b>	<b>2.0</b>	<b>1.6</b>	<b>1.9</b>
<b>Foreign Securities</b>					
Bonds	0.7	0.4	0.3	-0.6	0.3
Common and preferred stocks	-0.4	0.0	-0.2	0.3	0.1
<b>Total</b>	<b>0.3</b>	<b>0.4</b>	<b>0.0</b>	<b>-0.9</b>	<b>0.4</b>

disinvestment in foreign stocks (\$111 million), following a net investment of \$1.5 billion in the previous six months.

For further information, order *Canada's International Transactions in Securities* (catalogue 67-002, formerly known as *Security Transactions with Non-residents*) or contact *Balance of Payments Division*, at (613) 951-9052.

## Building Permits : Lowest Value in Five Years

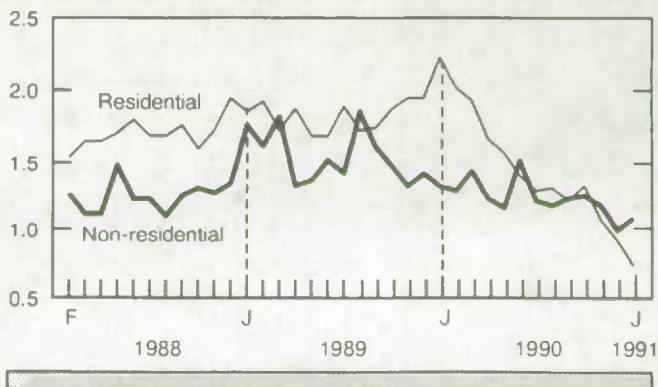
In January, the preliminary value of building permits decreased by 3.9% to \$1.8 billion, the lowest level in five years. This represented a cumulative decline of 49.3% from the level in August 1989.

Residential permits dropped 18.6% to \$716 million, after two similar declines. This represented a cumulative drop of 67.6% since January 1990. This year-over-year drop is the largest ever recorded. In the 1981-1982 recession, residential permits had dropped 60% in six months. Single-family dwellings dropped by 24.8% to \$437 million, while multi-family dwellings fell 6.6%.

Non-residential building permits increased by 9.3% to \$1.1 billion. Commercial permits jumped by 18.2% to \$650 million, after declining in the previous two months. This increase was partly offset by declines in the industrial sector (-2.6%) and the institutional sector (-1.7%).

### Building Permits

Billions of dollars, seasonally adjusted



For further information, order *Building Permits* (catalogue number 64-001) or contact Investment and Capital Stock Division at (613) 951-2025.

## PROVINCIAL PERSPECTIVES: BUILDING PERMITS

### Building Permits, January 1991

Province	Total		Residential		Non-residential	
	(\$ millions)	% change from December 1990	(\$ millions)	% change from December 1990	(\$ millions)	% change from December 1990
Canada	1,783	-3.9	715	-18.6	1,068	9.3
Atlantic	135	41.5	64	-12.9	71	225.9
Québec	395	9.4	173	-10.9	222	33.0
Ontario	767	5.4	214	-35.3	553	39.3
Prairies	231	-27.9	97	-17.4	134	-33.9
British Columbia	255	-27.4	168	2.4	87	-53.5

\* Data are seasonally adjusted.

## Help-wanted Index Maintains Downward Trend

The Help-wanted Index for Canada (1981 = 100) declined by 2.6% to 74 in March, maintaining the downward trend started in April 1989.

The index for Quebec declined by 7.1%, after drops averaging 5.0% in the previous five months. The index for the Atlantic provinces fell 5.0%, faster than average declines of 3.3% in the previous four months. For other regions, changes were small (one index point).

For further information, contact Labour Division at (613) 951-4044 (FAX 951-4087).

### Help-wanted Index (1981 = 100)

March 1991

	Index	% change, previous month	% change previous year
Atlantic	114	-5.0	-37.4
Quebec	78	-7.1	-46.9
Ontario	71	1.4	-45.8
Prairies	56	-1.8	-37.1
British Columbia	78	-1.3	-38.1
Canada	74	-2.6	-43.5



## Wholesale Sales Continue to Decline

After adjustment for the removal of the Federal Sales Tax and the introduction of the Goods and Services Tax (see note accompanying the article on retail trade), seasonally adjusted wholesale merchants' sales decreased by 4.0% in January, following an increase of 1.9% in December and a generally declining trend started in early 1990.

The decline was widespread and affected all provinces and territories. All nine trade groups registered lower sales than in December 1990.

Inventories were \$23.3 billion, 0.5% lower than in the previous month. This represents the sixth consecutive monthly decline. The ratio of inventories to sales went up from 1.58 in December to 1.71 in January.

*For further information, order Wholesale Trade (catalogue number 63-008) or contact Industry Division at (613) 951-3540.*

## Retail Trade : Largest Decline in Seven Years

After adjustment for the replacement of the Federal Sales Tax by the Goods and Services Tax (see note), retail sales declined by about 3.5% in January, the largest drop in over seven years.

All trade groups except drugs and patent medicine stores (+1.2%) reported lower sales. The six trade groups related to apparel and furniture, appliances and furnishings posted unusually large declines, following higher than average increases in December. Sales of motor vehicle and recreational vehicle dealers fell for the seventh consecutive month, this time by 3.5%.

All provinces and territories reported lower sales in January.

*Note: Estimates for retail and wholesale trade for 1991 exclude the GST. Prior to 1991, estimates included the Federal Sales Tax (FST). An estimate of the amount of FST in retail sales has been calculated for total sales in Canada for 1990. However, at the provincial or trade group level, data for 1991 are not strictly comparable to those for previous years. The changes noted in this release should therefore be used with caution.*

*For further information, order Retail Trade (catalogue number 63-005) or contact Industry Division at (613) 951-3551.*

## Earnings Growth Decelerates

In January, average weekly earnings registered a year-over-year increase of 5.0%, decelerating for a second month in a row.

In the goods-producing industries, the year-over-year growth in earnings was 4.8%, much lower than the 1990 annual growth rate of 5.8%.

In the service-producing industries, the year-over-year increase in earnings was 5.9% in January, little changed from the 1990 average growth rate of 5.8%. The year-to-date earnings growth in non-commercial services (6.2%) was similar to that observed in the last six months of 1990, but was higher than the 1990 annual growth rate (5.8%). By contrast, finance, insurance and real estate showed a year-over-year growth of 1.8%, the lowest of all

service-producing industries. This weakness was mainly attributable to the real estate industry which showed a twelfth consecutive month of year-over-year decline.

In the goods-producing industries, employees paid by the hour worked an average of 37.5 hours per week, lower than the average for January 1990 (38.3 hours) and earned on average \$15.67 per hour. In service-producing industries, hourly-paid employees worked on average 27.5 hours, in line with the average work-week last year and earned \$11.80 per hour.

*For further information, order Employment, Earnings and Hours (catalogue number 72-002) or contact Labour Division at (613) 951-4090 (FAX, (613) 951-4087).*

## Industrial Product Price Index Edges Down

The Industrial Product Price Index edged down 0.3% in February for the first time in seven months. Of the 21 industry groups, ten registered declines, while seven increased and four stayed unchanged.

The petroleum and coal products component fell 2.9%, reflecting mainly lower prices for gasoline and other fuel oil. The lumber, sawmill, and other wood products component dropped by 0.5%, the ninth

consecutive decrease. The chemicals and chemical products index decreased by 0.3%, its first decline since July 1990, due mainly to a 2.8% drop in prices for synthetic resins. The primary metal products component posted a fifth consecutive decline (-0.3%). The component for paper and paper products fell by 0.3%, due mainly to a drop in pulp prices.

*For further information, order Industry Price Indexes (catalogue number 62-011) or contact Prices Division at (613) 951-9607.*

## RMPI Continues to Drop

The Raw Materials Price Index declined by 3.5% in February, the third decrease in a row. Of the seven components, two fell, four rose and one was unchanged.

The mineral fuels component was down 10.0%, resulting mainly from lower crude oil prices, as natural gas prices rose slightly. The non-ferrous

metals component declined by 1.2% as lower prices for concentrates of zinc, lead and precious metals were partially offset by hikes in prices of copper and nickel concentrates. The animal and animal products component was up 0.9%, reflecting higher prices for hogs and fish.

*For further information, order Industry Price Indexes (catalogue number 62-011) or contact Prices Division at (613) 951-9607.*

## Number of Regular Unemployment Insurance Beneficiaries Still Rising

The number of regular beneficiaries of unemployment insurance was 1.1 million in January. This represented an increase of 2.7% from the previous month and 26.9% from February 1990. The jump in the number of beneficiaries was sharpest in British Columbia (8.4%) and the Yukon (4.3%). All provinces except Saskatchewan (-1.2%) registered increases.

Total benefit payments, adjusted for seasonal variations and the number of working days, rose 6.6% to \$1.3 billion. The number of benefit weeks increased 24.0% to 6.2 million.

*For further information, order Unemployment Insurance Statistics (catalogue number 73-001) or contact Labour Division at (613) 951-4044 (FAX: 951-4087).*

### U.I. Beneficiaries Receiving Regular Benefits

Millions, seasonally adjusted



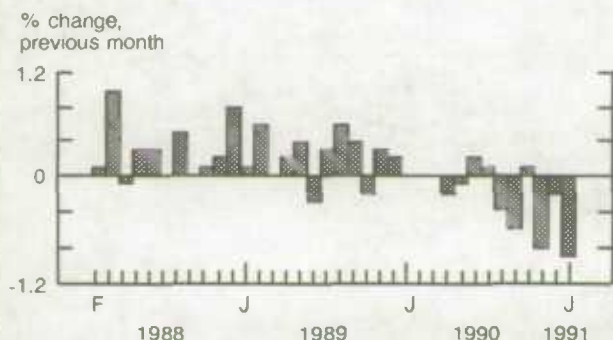


# PUBLICATIONS RELEASED FROM MARCH 22 TO APRIL 2, 1991

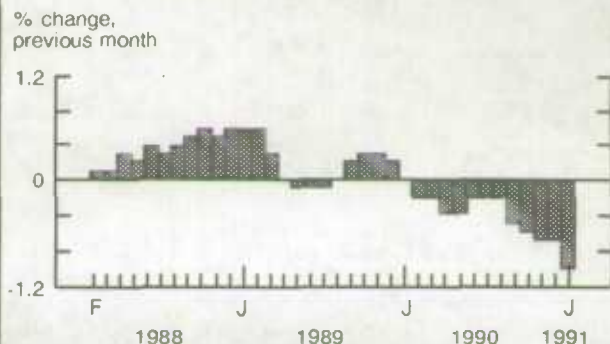
Division/title	Period	Catalogue Number	Price: Issue/Subscription		
			Canada (\$Cdn.)	United States	Other Countries
			\$US		
<b>AGRICULTURE</b>					
Farm Product Price Index (1986 = 100)	January 1991	62-003	7.10/71	8.50/85	9.90/99
<b>BALANCE OF PAYMENTS</b>					
Canada's Balance of International Payments	Fourth Quarter 1990	67-001	27.50/110	33/132	38.50/154
Security Transactions with Non-Residents	December 1990	67-002	15.80/158	19/190	22.10/221
<b>EDUCATION, CULTURE AND TOURISM</b>					
Public Libraries	1988-89	87-205	30	36	42
Touriscope - International Travel - National and Provincial Counts	October-December 1990	66-001	38.50/154	46.25/185	54/216
<b>GENERAL</b>					
Listing of Supplementary Documents	1991	11-207	32.00	38.00	45.00
<b>HOUSING, FAMILY AND SOCIAL STATISTICS</b>					
Canadian Social Trends	Spring 1991	11-008E	8.50/34	10/40	12/48
<b>INDUSTRY</b>					
Corrugated Boxes and Wrappers	February 1991	36-004	5/50	6/60	7/70
Crude Petroleum and Natural Gas Production	November 1990	26-006	10/100	12/120	14/140
Department Store Sales and Stocks	August 1990	63-002	14.40/144	17.30/173	20.20/202
Electrical Trade Contractors, The Construction Industry	1987	64-205	22	26	31
Gas Utilities	November 1990	55-002	12.70/127	15.20/152	17.80/178
Mechanical Trade Contractors, The Construction Industry	1987	64-204	22	26	31
Mineral Wool Including Fibrous Glass Insulation	February 1991	44-004	5/50	6/60	7/70
Monthly Survey of Manufacturing	January 1991	31-001	17.30/173	20.80/208	24.20/242
Oil Pipe Line Transport	December 1990	55-001	10/100	12/120	14/140
Production and Disposition of Tobacco Products	February 1991	32-022	5/50	6/60	7/70
Production, Shipments and Stocks on Hand of Sawmills East of the Rockies - (Excluding Newfoundland and Prince Edward Island)	January 1991	35-002	10/100	12/120	14/140
Production, Shipments and Stocks on Hand of Sawmills in British Columbia	January 1991	35-003	7.10/71	85/85	9.90/99
Refined Petroleum Products	December 1990	45-004	18.20/182	21.80/218	25.50/255
<b>JUSTICE</b>					
Juristat - Service Bulletin - The Application of Dispositions Under the Young Offenders Act	March 1991	85-002	3.90/78	4.70/94	5.45/109
<b>LABOUR</b>					
Quarterly Estimates of Trusteed Pension Funds	Third Quarter 1990	74-001	11/44	13.25/53	15.50/62
Employment, Earnings and Hours	December 1990	72-002	38.50/385	46.20/462	53.90/539
Unemployment Insurance Statistics	December 1990	73-001	14.70/147	17.60/176	20.60/206
<b>PRICES</b>					
Construction Price Statistics	Fourth Quarter 1990	62-007	18/72	21.50/86	25.25/101
Industry Price Indexes	January 1991	62-011	18.20/182	21.80/218	25.50/255
The Consumer Price Index	February 1991	62-001	9.30/93	11.20/112	13/130
<b>SERVICES, SCIENCE AND TECHNOLOGY</b>					
Business Services	1986-1988	63-232	30	36	42
Radio and Television Broadcasting	1989	56-204	26	31	36
Restaurant, Caterer and Tavern Statistics	October 1990	63-011	6.10/61	7.30/73	8.50/85
Service Bulletin - Communications	March 1991	56-001	8.20/49	9.85/59	11.50/69
Service Industry Bulletin	Seasonal	63-015	7.20/43.00	8.65/52.00	10/60
Telephone Statistics	1989	56-203	36	43	50
<b>TRANSPORTATION</b>					
Passenger Bus and Urban Transit Statistics	November 1990	53-003	7.10/71	8.50/85	9.90/99
Railway Carloadings	January 1991	52-001	8.30/83	10/100	11.60/116
Service Bulletin - Surface and Marine Transport	March 1991	50-002	9.40/75	11.25/90	13.15/105

## CURRENT TRENDS

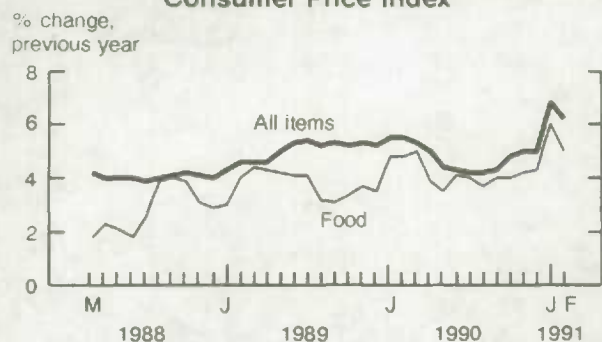
### Gross Domestic Product



### Composite Leading Indicator



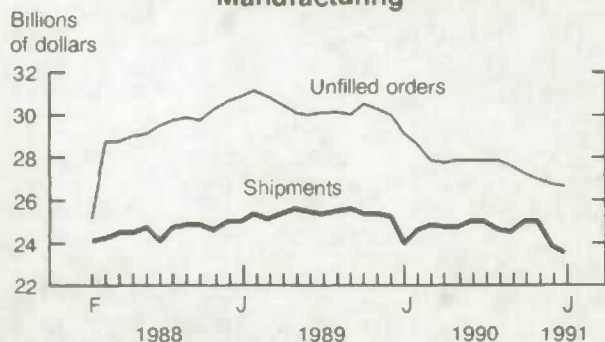
### Consumer Price Index



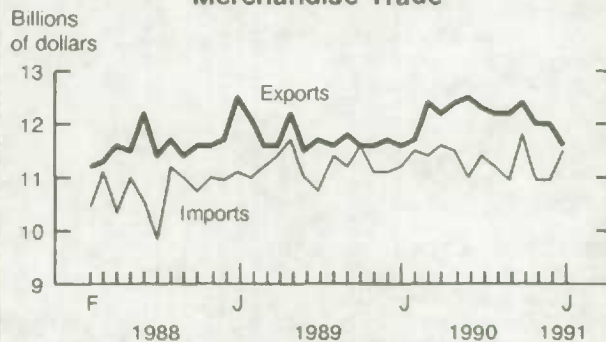
### Unemployment Rate



### Manufacturing



### Merchandise Trade



**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)	January*	498	-0.9%	-2.8%
Composite Leading Indicator (1981 = 100)	January*	138.4	-1.0%	-5.2%
Profits of Industrial Corporations (\$ billion)	3rd Q	5.2	13.6%	-29.5%
<b>DOMESTIC DEMAND</b>				
Retail Trade (\$ billion)	January*	14.7	-7.6%	-10.0%
New Motor Vehicle Sales ('000 units)	January	100.5	18.6%	-11.7%
<b>LABOUR</b>				
Employment (millions)	February	12.3	-0.5%	-2.6%
Unemployment Rate (%)	February	10.2	0.5	2.6
Participation Rate (%)	February	66.4	0.0	-0.8
Labour Income (\$ billion)	December	31.9	-0.3%	4.3%
Average Weekly Earnings (\$)	January*	526.02	0.6%	5.0%
<b>INTERNATIONAL TRADE</b>				
Merchandise Exports (\$ billion)	January	11.6	-2.9%	0.1%
Merchandise Imports (\$ billion)	January	11.5	5.0%	2.4%
Merchandise Trade Balance (\$ billion)	January	0.2	-0.9	-0.3
<b>MANUFACTURING</b>				
Shipments (\$ billion)	January	23.4	-1.5%	-2.1%
New Orders (\$ billion)	January	23.2	-1.2%	0.5%
Unfilled Orders (\$ billion)	January	26.5	-0.7%	-9.0%
Inventory/ Shipments Ratio	January	1.58	0.00	-0.02
Capacity Utilization (%)	4th Quarter	74	-3.6	-7.8
<b>PRICES</b>				
Consumer Price Index (1986 = 100)	February*	125.0	0.0%	6.2%
Industrial Product Price Index (1986 = 100)	February*	110.8	-0.3%	1.2%
Raw Materials Price Index (1986 = 100)	February*	110.3	-3.5%	1.4%
New Housing Price Index (1986 = 100)	January	133.4	-2.0%	-8.8%

*Note: All series are seasonally adjusted with the exception of average weekly earnings and the price indexes.*

*\* New this week.*



# June 4

## CENSUS DAY



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**KEY RELEASE CALENDAR: April 1991**

Monday	Tuesday	Wednesday	Thursday	Friday
1	2 Composite Leading Indicator, January Retail Trade, January	3 Help-wanted Index, March	4	5 Labour Force Survey, March Labour Income, January
8	9 New Motor Vehicle Sales, February	10	11 New Housing Price Index, February	12 Farm Product Price Index, February
15	16 International Travel, February	17	18 International Merchandise Trade, February Survey of Manufacturing, February	19 The Consumer Price Index, March
22 Financial Statistics for Enterprises, 4 <sup>th</sup> Quarter 1990	23 Retail Trade, February Wholesale Trade, February	24 Department Store Sales and Stocks, February Unemployment Insurance Statistics, February	25 Canada's International Transactions in Securities, February	26 Industrial Product Price Index, March Raw Materials Price Index, March Field Crop Reporting Series No. 3 - Stocks of Grain at March 31
29 Employment, Earnings and Hours, February	30 Real Gross Domestic Product at Factor Cost by Industry, February Building Permits, February			

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