



IN·F·O·M·A·T

A WEEKLY REVIEW

Friday, September 20, 1991

OVERVIEW

■ Manufacturers' Shipments Off in July

Shipments decreased 0.3% following four consecutive monthly increases. Unfilled orders continued to fall in July.

■ Consumer Price Index Almost Unchanged

The all-items CPI for Canada edged up 0.1% between July and August. A sharp decline in the food index offset increases for housing, clothing and transportation.

■ Capacity Utilization Rate Turns Upward

Capacity utilization in the manufacturing industries increased 1.7% in the second quarter, registering the first gain since early 1989.

■ Labour Market Conditions Show Little Change in August

The seasonally adjusted level of employment declined slightly in August while unemployment increased marginally. The unemployment rate moved up a notch to 10.6.

■ New Motor Vehicle Sales Buoyant

New motor vehicle sales increased 0.8% in July on a seasonally adjusted basis, recording the fourth straight monthly advance.

■ Labour Income Registers Decelerating Trend

Labour income in June advanced 3.2% from a year earlier. The year-to-date growth rate of 3.5% is slightly more than half the 1990 change.

This issue also contains information on new housing prices, quarterly financial statistics for enterprises and international travel.

Manufacturers' Shipments Off in July

Preliminary estimates indicate that Canadian manufacturers' shipments were \$23.4 billion in July, a decrease of 0.3% from the previous month. Thirteen of the 22 major groups recorded decreases.

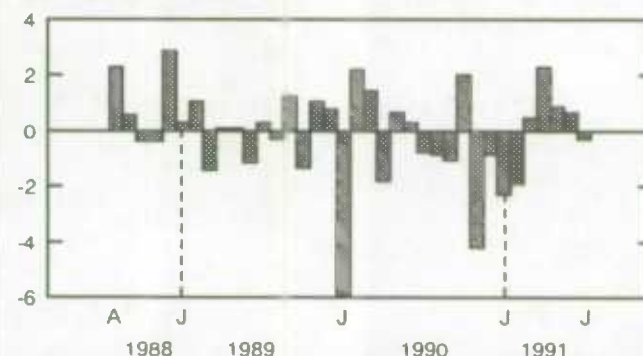
The inventories to shipments ratio remained unchanged in July at 1.53. The trend continued to decline from a peak of 1.62 in February 1991 to 1.54 in the current period.

Unfilled orders decreased 2.3% to \$24.1 billion. Unfilled orders have been declining for 21 months, apart from increases in August 1990 and April 1991. Most of the decrease in July 1991 was accounted for by machinery (-4.5%) and transportation equipment industries (-3.2%), notably the aircraft and aircraft parts industries, where cancellations were a major factor. The

(continued on page 2)

Shipments

% change, previous month



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... Manufacturers' Shipments Off in July

trend for unfilled orders continued to fall at the same rate for the last four periods.

Manufacturers' shipments for the first seven months of 1991 were estimated at \$161.6 billion, 6.8% lower than the value for the corresponding period in 1990.

For further information, order *Monthly Survey of Manufacturing* (catalogue number 31-001) or contact *Industry Division* at (613) 951-9832.

Consumer Price Index Almost Unchanged

The all-items Consumer Price Index (CPI) for Canada edged up 0.1% between July and August to a level of 126.9 (1986=100). The increase was unchanged from July and smaller than the 0.5% monthly changes recorded for May and June. The higher all-items index was largely due to increases in the indexes for housing (0.2%), clothing (0.9%) and transportation (0.3%), somewhat offset by a 1.2% decline in the index for food.

The decline in the food index was twice as sharp in August as in July 1991. The drop is attributable to a decrease of 1.8% in the index for food purchased from stores, partly offset by a marginal rise (0.2%) in the index for food purchased from restaurants. The situation is analogous to that observed for July.

The year-over-year increase in the CPI between August 1990 and August 1991 was 5.8%, unchanged from July but down from the approximately 6.3% recorded for the three-month period of February to June 1991.

In seasonally adjusted terms, the rise in the all-items index remained steady at 0.2%, following advances of 0.1%, 0.2% and 0.4% reported for April, May and June. The compound annual rate of increase for August, based on the seasonally adjusted index levels over the latest three-month period (May to August), was 3.2%, virtually the same as the rate of increase from May to August.

For further information, order *Consumer Price Index* (catalogue number 62-001) or contact *Prices Division* at (613) 951-9606. (See also "Current Trends" chart on page 8).

PROVINCIAL PERSPECTIVES: CONSUMER PRICES

The Consumer Price Index, Percentage Change, August 1991/1990*

Province/Territory	All-items	Food	Energy	All-items excluding food and energy	Housing
Canada	5.8	5.1	6.5	5.9	4.5
Newfoundland	6.4	5.9	6.3	6.6	5.3
Prince Edward Island	7.2	5.8	11.0	7.1	5.6
Nova Scotia	5.3	4.7	9.2	5.1	4.9
New Brunswick	6.7	5.6	8.0	6.9	6.0
Quebec	7.5	4.3	8.1	8.3	6.1
Ontario	5.1	5.1	7.2	4.8	3.9
Manitoba	5.1	4.2	6.2	5.2	5.3
Saskatchewan	5.7	7.7	2.3	5.7	4.0
Alberta	6.1	5.9	6.2	6.1	4.8
British Columbia	5.0	5.5	2.0	5.1	3.2
Yukon	5.9	5.1	13.0	5.4	4.8
Northwest Territories	6.3	5.9	7.7	6.3	4.3

* Data are not seasonally adjusted.

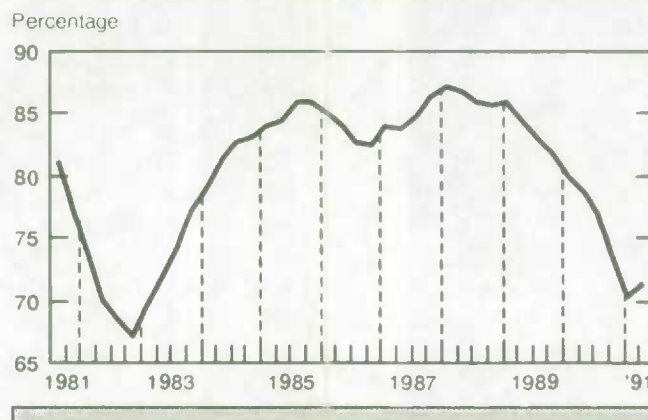
Capacity Utilization Rate Turns Upward

Capacity utilization in the manufacturing industries increased 1.7% in the second quarter to 71.3%. This marks the first gain in capacity utilization since the first quarter of 1989. The higher rates for 16 of the 22 industry major groups were the result of increased production. Of the six industries for which rates declined, four had increased shipments but maintained them through inventories rather than higher production. Only the paper and allied industries and machinery industries recorded both shipments and production decreases.

In the durable goods manufacturing industries, the capacity utilization rate rose 3.8% in the second quarter to 68.6%.

- With construction activity expanding, capacity utilization increased 8.1% in the wood industries and 9.2% in the non-metallic mineral products industries.
- As interest rates declined, demand for automobiles strengthened. Capacity utilization increased 6.9% in the transportation equipment manufacturing industries.
- The primary metals industries benefited from

Capacity Utilization Rate in Manufacturing



the higher levels of construction and automobile manufacturing and capacity utilization gained 3.1%.

In the non-durable goods manufacturing industries, capacity utilization showed no change in the second quarter, remaining at 74.3%, as gains by some industries were offset by declines in others.

For further information, contact Investment and Capital Stock Division at (613) 951-9685.

Labour Market Conditions Show Little Change in August

According to estimates from Statistics Canada's Labour Force Survey for August 1991, there was little change in overall labour market conditions. The seasonally adjusted level of employment declined slightly while the level of unemployment increased marginally. The unemployment rate edged up 0.1 to 10.6.

For the week ending August 17, 1991, the seasonally adjusted level of employment declined

slightly (-20,000) to 12,338,000. The drop was concentrated in part-time employment where there was a large increase the previous month. The employment/population ratio fell 0.2 to 59.3, the lowest level since July 1986.

The seasonally adjusted level of unemployment increased slightly (+13,000) to 1,462,000 and the unemployment rate increased 0.1 to 10.6.

For further information, contact Household Surveys Division at (613) 951-4720.

PROVINCIAL PERSPECTIVES

Labour Force Survey Results for August 1991

	Labour Force		Employment		Unemployment	
	'000	% change previous month	'000	% change, previous month	'000	Rate (%)
Canada	13,800	-0.1	12,338	-0.2	1,462	10.6
Newfoundland	239	1.3	193	0.5	46	19.2
Prince Edward Island	64	0.0	54	0.0	10	16.1
Nova Scotia	423	0.8	369	0.5	54	12.8
New Brunswick	327	0.3	285	0.0	42	12.8
Quebec	3,399	-0.1	2,990	-0.2	409	12.0
Ontario	5,297	-0.2	4,772	-0.2	525	9.9
Manitoba	544	0.4	491	0.2	53	9.7
Saskatchewan	482	-1.0	446	-1.1	36	7.5
Alberta	1,354	-0.4	1,247	0.2	107	7.9
British Columbia	1,646	-0.1	1,482	-0.3	164	10.0

New Motor Vehicle Sales Buoyant

Preliminary estimates indicate that sales of new motor vehicles totalled 119,000 units in July, an increase of 0.8% over the revised level in June 1991. Passenger car sales increased by 1.5% while truck sales recorded a moderate decline of 0.6%.

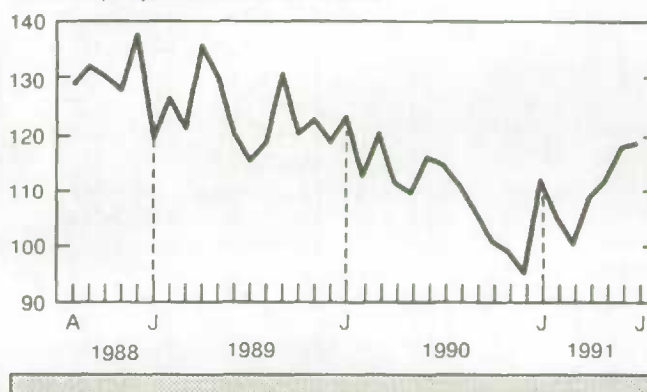
The July gain in new motor vehicle sales followed three strong increases and further extended the trend of rising sales observed since the beginning of 1991.

By origin, both sales of North American and imported passenger cars increased by 1.5% in July 1991, totalling 55,000 and 26,000 units, respectively. The increase for North American passenger car sales marked the fourth consecutive monthly gain, whereas the gain in imported passenger car sales followed a decline of 2.6%.

For further information, order New Motor Vehicle Sales (catalogue number 63-007) or contact Industry Division at (613) 951-3552.

Sales of New Motor Vehicles

Seasonally adjusted, thousands of units



Labour Income Registers Decelerating Trend

The June 1991 preliminary estimate of labour income, which comprises approximately 50% of the Gross Domestic Product in the National Income and Expenditure Accounts, was \$33.3 billion, an increase of 3.2% from June 1990. The year-to-date growth rate of labour income was 3.5%, down from the 1990 annual change of 6.7%.

The seasonally adjusted estimate of wages and salaries was little changed (0.1%) in June, following strong growth in May (0.7%) and April (0.6%).

Wage and salaries increases were noted in transportation, communications and other utilities

(1.8%), health and welfare services (0.7%), education and related services (0.7%) and construction (0.6%). Wages and salaries in finance, insurance and real estate rose by 0.6%, the third consecutive monthly increase.

Decreases in wages and salaries were recorded in June in all three levels of public administration. The largest decline occurred in federal and other government administration (-2.2%). Wages and salaries in forestry also recorded a drop of 2.2%.

For further information, order Estimates of Labour Income (catalogue number 72-005) or contact Labour Division at (613) 951-4050.

New Housing Prices

The New Housing Price Index (1986 = 100) for Canada stood at 131.4 in July, up 0.2% from June. The estimated House Only Index increased 0.2% while the estimated Land Only index increased 0.4%.

In July the largest monthly increase in new housing prices was registered in Vancouver (1.6%) while the largest monthly decrease was recorded in Calgary (-0.8%).

This index of Canadian housing contractors' selling prices now stands 7.9% lower than the year-earlier level. Toronto was mainly responsible for this downward movement with a decrease of 14.7% since July 1990.

For further information, order Construction Price Statistics (catalogue number 62-007) or contact Prices Division at (613) 951-9607.

Enterprises' Financial Statistics

In the second quarter of 1991, operating profits of Canadian financial and non-financial corporations remained unchanged from the previous quarter at \$11.8 billion – only the second time in 10 quarters that profits did not decline. In the course of their declines, operating profits had fallen from a high of \$22.9 billion to the low of \$11.8 billion registered in the first quarter of this year, a reduction of almost 50%. During the 1981-82 recession, when the downturns in profits and gross domestic production coincided, operating profits declined for only four consecutive quarters and the cumulative reduction was no more than 23%.

In the non-financial industries, operating profits increased 3.6% to \$8.3 billion. Profits had fallen in eight of the previous nine quarters to reach a low of \$8.0 billion in the first quarter of 1991. The industries with the most significant second-quarter profit increases included motor vehicles, parts, and accessories (\$585 million) and real estate developers, builders and operators (\$468 million). The largest profit declines were in petroleum and

natural gas (\$617 million) and non-ferrous metals and primary metal products (\$139 million).

In the financial industries, life insurers' operating profits were down \$222 million and chartered banks posted a \$81 million decline in profits.

Return on Equity: Profitability, as measured by the rate of return on shareholder's equity, continued to decline in the second quarter as it fell to 1.98% from 2.47% in the first quarter and an average of 5.38% in 1990. Return on shareholders' equity peaked in the first quarter of 1988 at 12.3%.

Debt to Equity: This solvency indicator rose to 1.07 from 1.06 in the first quarter and average of 1.03 in 1990. This indicator is currently at its highest level since it registered 1.08 in 1985, but is still well below the 1.23 levels during the 1981-82 recession. The current-quarter increase is due to a \$1.2 billion increase in total borrowing and a \$1.7 billion decline in shareholders' equity.

For further information, contact Industrial Organization and Finance Division at (613) 951-9843.

International Travel

In July, same-day automobile travel by Canadian residents to the United States increased 9% compared with July 1990, the smallest year-over-year gain since March 1987. However, overnight automobile trips jumped 17% over the same month a year ago. Meanwhile, overnight trips by Canadian residents to the United States by other modes of transportation decreased 6%, while travel to countries other than the United States also declined (-9%) compared with the same month a year ago, marking the seventh consecutive decline from the previous year in both cases.

United States residents' overnight trips by automobile to Canada decreased by less than 1% from July of last year. Their visits by other modes of transportation declined by a wider margin, down 3% from July 1990. The number of visits of one or more nights to Canada from countries other than the United States was down 3%, with direct entries from overseas marginally higher (1%) in July 1991.

For further information, contact the Education, Culture and Tourism Division at (613) 951-8933.

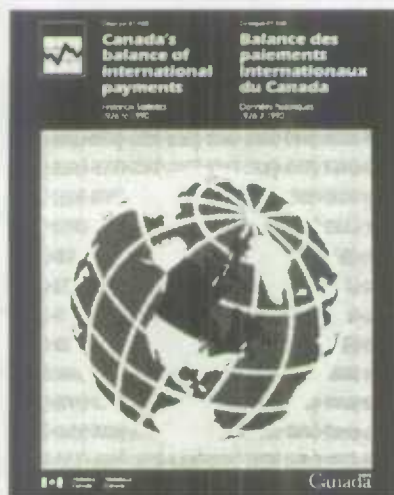
PUBLICATIONS RELEASED FROM SEPTEMBER 6 TO 19, 1991

Division/Title	Period	Catalogue Number	Price: Issue/Subscription		
			Canada (\$Cdn.)	United States	Other Countries
			\$US		
Agriculture					
Cereals and Oilseeds Review	June 1991	22-007	13.80/138	16.60/166	19.30/193
Field Crop Reporting Series	No. 6	22-002	12/80	14/96	16/112
Balance of Payments					
Canada's Balance of International Payments, Historical Statistics	1926 to 1990	67-508	50	60	70
Canada's International Transactions in Securities	June 1991	67-002	15.80/158	19/190	22.10/221
Education, Culture and Tourism					
Focus on Culture	Autumn 1991	87-004	6.25/25	7.50/30	8.75/35
Education In Canada	1989-90	81-229	50	60	70
Touriscope: International Travel	July 1991	66-001P	6.10/61	7.30/73	8.50/85

PUBLICATIONS RELEASED (Concluded)

Division/title	Period	Catalogue Number	Price: Issue/Subscription		
			Canada (\$Cdn.)	United States	Other Countries
			\$US		
Industry					
Asphalt Roofing	July 1991	45-001	5/50	6/60	7/70
Cement	July 1991	44-001	5/50	6/60	7/70
Coal and Coke Statistics	June 1991	45-002	10/100	12/120	14/140
Crude Petroleum and Natural Gas Production	May 1991	26-006	10/100	12/120	14/140
Electric Power Statistics	June 1991	57-001	10/100	12/120	14/140
Factory Sales of Electric Storage Batteries	July 1991	43-005	5/50	6/60	7/70
Footwear Statistics	July 1991	33-002	5/50	6/60	7/70
Gas Utilities	May 1991	55-002	12.70/127	15.20/152	17.80/178
Gypsum Products	July 1991	44-003	5/50	6/60	7/70
Industrial Chemicals and Synthetic Resins	July 1991	46-002	5.60/56	6.70/67	7.80/78
Leather and Allied Products Industries	1988	33-251	35	42	49
Logging Industry	1988	25-201	30	36	42
Monthly Survey of Manufacturing	July 1991	31-001	17.30/173	20.80/208	24.20/242
Oil Pipe Line Transport	June 1991	55-001	10/100	12/120	14/140
Pack of Processed Asparagus	1991	32-233	13	16	18
Particleboard, Waferboard and Fibreboard	July 1991	36-003	5/50	6/60	7/70
Primary Textile Industries	1988	34-250	35	42	49
Printing, Publishing and Allied Industries	1988	36-251	35	42	49
Production and Shipments of	Quarter Ended				
Blow-Moulded Plastic Bottles	June 30, 1991	47-006	6.75/27	8/32	9.50/38
Production, Sales and Stocks of Major					
Appliances	July 1991	43-010	5/50	6/60	7/70
Pulpwood and Wood Residue Statistics	July 1991	25-001	6.10/61	7.30/73	8.50/85
Quarterly Shipments of Office	Quarter Ended				
Furniture Products	June 30, 1991	35-006	6.75/27	8/32	9.50/38
Retail Trade	June 1991	63-005	18.20/182	21.80/218	25.50/255
Specified Domestic Electrical Appliances	July 1991	43-003	5/50	6/60	7/70
The Sugar Situation	July 1991	32-013	5/50	6/60	7/70
Textile Products Industries	1988	34-251	35	42	49
Wholesale Trade	June 1991	63-008	14.40/144	17.30/173	20.20/202
Industrial Organization and Finance					
Quarterly Financial Statistics for					
Enterprises	First Quarter 1991	61-008	23/92	27.50/110	32.25/129
International Trade					
Exports by Commodity	June 1991	65-004	55.10/551	66.10/661	77.10/771
Imports by Country	January-June 1991	65-006	82.75/331	99.25/397	115.75/463
Imports by Commodity	June 1991	65-007	55.10/551	66.10/661	77.10/771
Preliminary Statement of Canadian					
International Trade	July 1991	65-001P	10/100	12/120	14/140
Investment and Capital Stock					
Building Permits	June 1991	64-001	22.10/221	26.50/265	30.90/309
Justice					
Juristat Service Bulletin, Vol. 11, No. 13	September 1991	85-002	3.60/90	4.30/108	5/126
Labour					
Employment, Earnings and Hours	June 1991	72-002	38.50/350	46.20/462	53.90/539
Estimates of Labour Income	January - March 1991	72-005	22.50/90	27/108	31.50/126
The Labour Force	August 1991	71-001	17.90/179	21.50/215	25.10/251
Labour Force Information	For the week ended				
August 17, 1991		71-001P	6.30/63	7.60/76	8.80/88
Labour and Household Surveys Analysis					
Perspectives on Labour and Income	Autumn 1991	75-001E	13.25/53	16/64	18.50/74
Prices					
Consumer Prices and Price Indexes	April-June 1991	62-010	18/72	21.50/86	25.25/101
Consumer Price Index	August 1991	62-001	9.30/93	11.20/112	13/130
Services, Science and Technology					
Service Bulletin Science Statistics	1989-90	88-001	7.10/71	8.50/85	9.90/99
Transportation					
Surface and Marine Transport	Vol.7, No. 5, August 1991	50-002	9.40/75	11.25/90	13.15/105

NEW FROM STATISTICS CANADA



Canada's Balance of International Payments: Historical Statistics, 1926 to 1990

Data on the evolution of Canada's international transactions is of particular importance at a time when Canadian businesses and governments are becoming more involved in international markets. Statistics Canada has just released a new compendium of these transactions, the first of its kind since 1967.

Canada's Balance of International Payments: Historical Statistics, 1926 to 1990 allows users to track Canada's transactions with non-residents over a 65-year period. Data are now available in a continuous format, avoiding the need for users to bridge old and new data series.

Detailed data by trading area, in annual and quarterly series, raw and seasonally adjusted are presented in 150 tables. Tables are designed for ease of reading and accessibility, with guides to subject matter and to the CANSIM database. Series not presently on CANSIM are available on diskette (LOTUS 1-2-3 format).

Canada's Balance of International Payments: Historical Statistics, 1926 to 1990 (67-508, \$50) is now available. See "How to Order Publications".

For further information, contact Lucie Laliberté (613-951-9055), Balance of Payments Division.

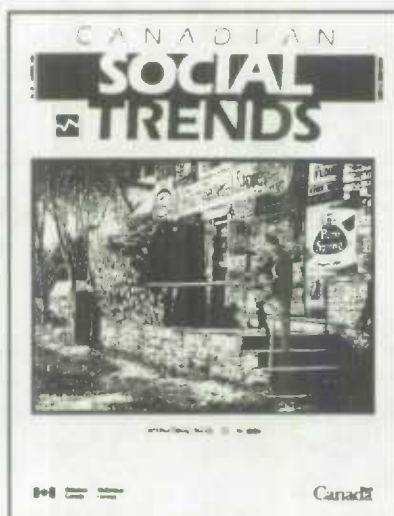
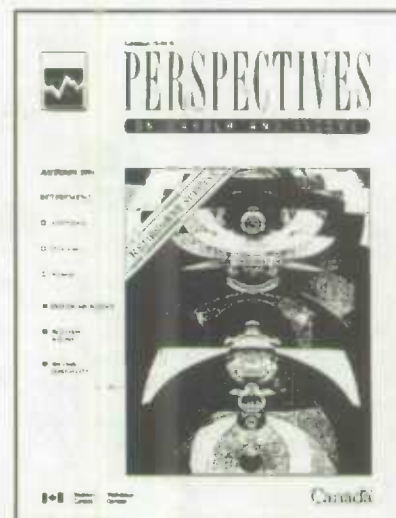
Perspectives on Labour and Income, Autumn 1991

The Autumn 1991 edition of Statistics Canada's quarterly journal on labour and income issues has been released.

This edition focuses on retirement-related issues: specifically, general retirement attitudes and plans, early-retirement incentives and women approaching retirement. A mid-year review, examining changes in the labour market situation and the Canadian economy during the first six months of 1991, is also included. In addition, there is an article comparing employment conditions in large and small firms, and a report on family-income inequalities in the 1980s.

Each quarter, *Perspectives on Labour and Income* taps many different data sources to examine and offer insights on emerging issues. Articles trace recent labour market developments as well as current income issues.

The Autumn 1991 edition of *Perspectives on Labour and Income* (75-001E, \$13.25/\$53) is now available. See "How to Order Publications". To obtain further information on this release, contact Ian Macredie (613-951-9456) or Cécile Dumas (613-951-6894).



Canadian Social Trends

Canadian travel abroad is increasing, according to the Autumn 1991 issue of *Canadian Social Trends*. While trips to non-traditional destinations such as Japan and South America are increasing, most international travel – 96% of trips in 1990 – is to the United States. Furthermore, the number of trips of less than 24 hours by Canadians to the United States increased by 90% between 1980 and 1990, while day-trips by Americans to Canada decreased by 18% over this period. Increasing Canadian travel abroad and declining travel to Canada has resulted in a growing travel deficit, \$4.5 billion in 1990 alone.

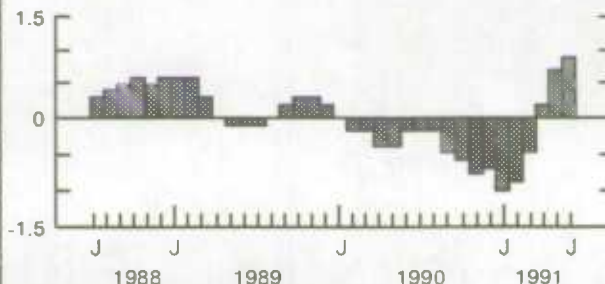
Women, aboriginal people, visible minorities and people with disabilities have been identified as disadvantaged in the work force. These groups are the focus of an article on employment equity. Child care, Canada's seniors, French immersion programs, and declining church attendance are other topics featured in the Autumn 1991 issue.

The Autumn 1991 issue of *Canadian Social Trends* (11-008E, \$8.50/\$34) is now available. See "How to Order Publications".

For further information, contact the editors at (613-951-2560).

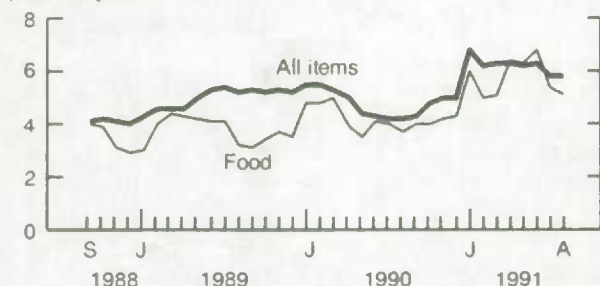
% change,
previous month

Real GDP at factor cost slowed to an advance of 0.1% in June, following growth of 0.4% in May and 1.1% in April.

% change,
previous month

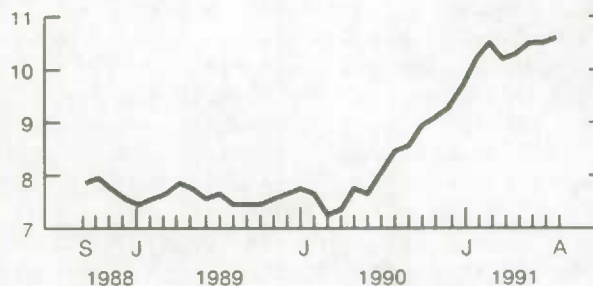
The Composite Leading Indicator rose 0.9% in June, accelerating from 0.7% in May and 0.2% in April.

% change,
previous year



The all-items CPI for Canada edged up 0.1% between July and August. A sharp decline in the food index offset increases for housing, clothing and transportation.

%



The unemployment rate moved up a notch to 10.6 in August.

Billions
of dollars



Shipments decreased 0.3% following four consecutive monthly increases. Unfilled orders continued to fall in July.

Billions
of dollars



In June, exports increased 1.0% and total merchandise imports climbed 4.1%.

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)	June	505	0.1%	-0.8%
Composite Leading Indicator (1981 = 100)	June	139.0	0.9%	-3.4%
Profits of Industrial Corporations (\$ billion)	2nd Quarter*	11.8	0.0%	-26.7%
DOMESTIC DEMAND				
Retail Trade (\$ billion)	June	15.2	0.0%	-4.2%
New Motor Vehicle Sales ('000 units)	July*	118.8	0.8%	3.9%
LABOUR				
Employment (millions)	August*	12.3	-0.2%	-1.8%
Unemployment Rate (%)	August*	10.6	0.1	2.2
Participation Rate (%)	August*	66.4	-0.1	-0.6
Labour Income (\$ billion)	June*	32.3	0.1%	3.4%
Average Weekly Earnings (\$)	June	542.85	1.1%	5.8%
INTERNATIONAL TRADE				
Merchandise Exports (\$ billion)	June	11.8	1.0%	-6.2%
Merchandise Imports (\$ billion)	June	11.0	4.1%	-3.6%
Merchandise Trade Balance (\$ billion)	June	0.9	-0.3	-0.3
MANUFACTURING				
Shipments (\$ billion)	July*	23.4	-0.3%	-5.2%
New Orders (\$ billion)	July*	22.9	-2.2%	-7.4%
Unfilled Orders (\$ billion)	July*	24.1	-2.3%	-11.6%
Inventory/ Shipments Ratio	July*	1.53	0.00	0.00
Capacity Utilization (%)	2nd Quarter*	71.3	1.2	-5.6
PRICES				
Consumer Price Index (1986 = 100)	August*	126.9	0.1%	5.8%
Industrial Product Price Index (1986 = 100)	July	108.2	-0.3%	-0.8%
Raw Materials Price Index (1986 = 100)	July	102.8	-1.2%	-0.3%
New Housing Price Index (1986 = 100)	July*	131.4	0.2%	-7.9%

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

* New this week.

I·N·F·O·M·A·T

A Weekly Review

Published by the Communications Division Statistics Canada.

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K1A 0T6.

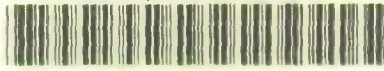
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