

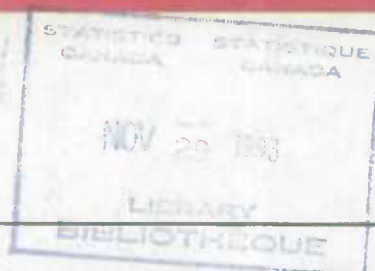


# IN·F·O·M·A·T

## A WEEKLY REVIEW

NOT FOR LOAN  
NE S'EMPRUNTE PAS

Friday, November 26, 1993



### OVERVIEW

#### ■ Profits of Enterprises Drop in Third Quarter

Seasonally adjusted operating profits of all Canadian enterprises fell 6.9% in the third quarter of 1993 following two quarters of strong growth.

#### ■ UI Beneficiaries Total Down to Three-year Low

In September, the seasonally adjusted number of beneficiaries receiving regular unemployment insurance benefits fell 2.1% to a three-year low of 1.05 million persons.

#### ■ Pressure on Consumer Prices Modest

Despite a 3.0% rise in property taxes in October, the monthly increase in the All-items Consumer Price Index remained in line with advances recorded since May.

#### ■ Wholesalers Report Strong Increase in Sales

Sales by wholesale merchants rose 1.9% in September, led by the activity of suppliers of machinery, equipment and supplies, other than farm machinery.

#### ■ Retail Sales Edge Down After Rising for Two Months

Seasonally adjusted retail sales slipped by 0.1% in September to \$16.3 billion but were 4.7% above their September 1992 level.

#### ■ Exports Recover in September

After declining by 0.4% in August, the seasonally adjusted value of merchandise exports increased 4.5% in September to a record high of \$15.6 billion.

This issue also includes information on **The Violence Against Women Survey** and on **assets of Trusteed Pension Funds**.

#### Profits of Enterprises Drop in Third Quarter

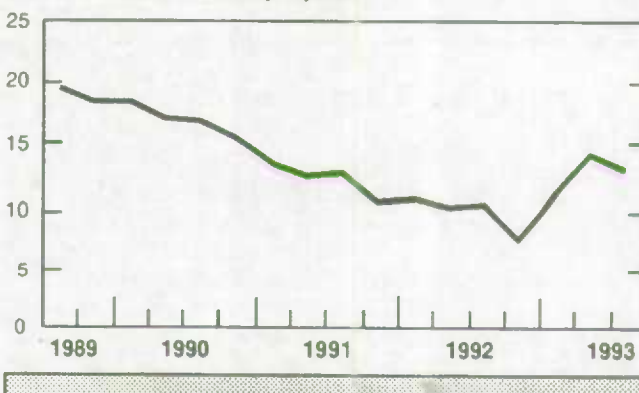
In the third quarter of 1993, seasonally adjusted operating profits of all Canadian enterprises declined 6.9% following two quarters of strong growth. Profits dropped to \$13.0 billion from \$14.0 billion in the second quarter, but remained well above the low of \$7.5 billion registered in the fourth quarter of 1992.

Operating profits of financial industries, including insurance companies, fell to \$3.3 billion in the third quarter from \$3.9 billion in the previous quarter. Quarterly profits averaged \$3.5 billion in 1991 but then fell to an average of \$2.1 billion in 1992.

(continued on page 2)

#### Operating Profits

Billions of dollars, seasonally adjusted



Statistics  
Canada

Statistique  
Canada

Canada

### ... Profits of Enterprises Drop in Third Quarter

Chartered banks saw their operating profits decline to \$1.3 billion in the third quarter from \$1.6 billion in the second quarter. The banks made provisions to cover future loan losses. In addition to chartered banks, property and casualty insurers' operating profits decreased \$0.1 billion to \$0.3 billion in the third quarter.

In the non-financial sector, operating profits fell from \$10.1 billion in the second quarter to \$9.7

billion in the third quarter. The largest declines were in the petroleum and natural gas industries and motor vehicles, parts and tires industries. In the food industries, operating profits continued to recover, rising from \$0.6 billion in the first quarter of 1993 to \$0.7 billion in the second quarter and to \$0.9 billion in the third quarter.

For further information, order *Quarterly Financial Statistics for Enterprises* (catalogue number 61-008) or contact Industrial Organization and Finance Division at (613) 951-9843.

### UI Beneficiaries Total Down to Three-year Low

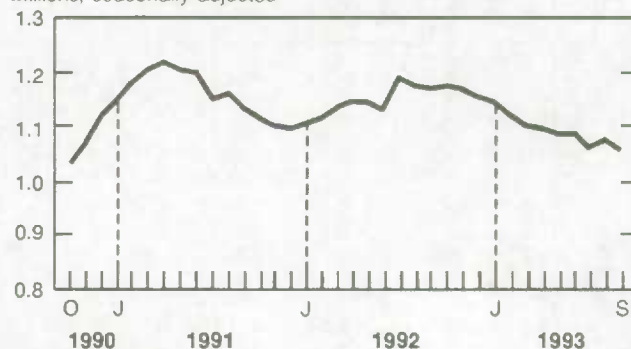
In September, the seasonally adjusted number of beneficiaries receiving regular unemployment insurance benefits fell 2.1% to a three-year low of 1.05 million persons. This was a continuation of a downward trend observed since November 1992, shortly interrupted in August 1993. The number of beneficiaries in September stood 9.9% below the level of a year ago (1.17 million).

#### U.I. Beneficiaries Receiving Regular Benefits, September 1993 Seasonally Adjusted

Province/ Territory	Total (000)	% change, previous month	% change, previous year
<b>Canada</b>	<b>1,053</b>	<b>-2.1</b>	<b>-9.9</b>
Newfoundland	62	0.9	-13.5
Prince Edward Island	14	-0.7	2.4
Nova Scotia	52	1.1	-4.2
New Brunswick	57	-0.2	-1.4
Québec	342	-2.4	-8.7
Ontario	288	-2.0	-13.2
Manitoba	28	-3.5	-9.3
Saskatchewan	24	-1.1	-7.2
Alberta	71	-3.0	-11.0
British Columbia	114	-2.0	-9.1
Yukon	2	-4.2	30.8
Northwest Territories	2	-7.2	-13.1

#### U.I. Beneficiaries Receiving Regular Benefits

Millions, seasonally adjusted



The decline in the number of beneficiaries was broadly-based: eight provinces and the Yukon and Northwest Territories posted significant decreases. On a year-over-year basis, nine provinces and the Northwest Territories recorded sharp declines.

Benefit payments for September totalled \$1.19 billion, down 2.3% from August and 10.4% less than the \$1.33 billion paid in September 1992.

For further information, order *Unemployment Insurance Statistics* (catalogue number 73-001) or contact Labour Division at (613) 951-4045.

### Pressure on Consumer Prices Modest

The All-items Consumer Price Index (CPI, 1986=100) for Canada rose by 0.2% in October to 130.9, following a marginal increase of 0.1% in both August and September. Four of the seven major components recorded increases while the remaining three indexes each fell by 0.2%. On a year-over-year basis, the CPI rose 1.9%, unchanged from September.

Much of a 0.2% advance in the housing index was attributable to an average 3.0% rise in property taxes, which are introduced into the CPI once a year

in October. This was the smallest increase in over a decade – comparable figures for 1991 and 1992 were 5.0% and 8.4%, respectively.

The food index advanced 0.2%, following declines of 0.4% in August and 0.6% in September. The increase reflected higher prices for salad vegetables, oranges, bakery products and beef. In contrast, there was a sharp 5.2% drop in poultry prices due to the sale of turkeys during the Thanksgiving period and specials for chickens, mainly in Alberta and British Columbia.

In the health and personal care index, much of the 0.4% rise reflected an increase in the Nova Scotia retail sales tax, which rose from 10% to 11%.



### ... Pressure on Consumer Prices Modest

The health care index fell 0.1% as prices of non-prescribed medicines declined 1.0%. The recreation, reading and education index also increased 0.4%, largely because of higher recreational charges.

A 1.4% decline in gasoline prices – attributable largely to price wars in several cities of Ontario, Québec, Alberta and British Columbia – accounted for a large part of the 0.2% decrease in the transportation index. The drop in gasoline prices, a decline that was partly offset by a 1.6% rise for piped gas, pushed the energy index down 0.5%.

After increasing by 0.5% in August and 0.2% in September, the clothing index fell 0.2%. The tobacco products and alcoholic beverages index also fell 0.2% mainly due to a drop of 0.3% in the prices of alcoholic beverages purchased from stores.

*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, October 1993/1992 \*

Province/territory	All-items	Food	Energy	Housing	Transportation
<b>Canada</b>	<b>1.9</b>	<b>1.5</b>	<b>0.6</b>	<b>1.3</b>	<b>3.4</b>
Newfoundland	1.8	2.7	-2.9	-0.3	2.6
Prince Edward Island	2.5	3.4	-1.2	1.6	1.2
Nova Scotia	2.6	3.2	0.3	2.1	3.3
New Brunswick	1.8	2.1	-1.0	0.7	2.1
Québec	0.7	-0.2	-0.8	0.4	1.9
Ontario	1.9	2.5	0.2	1.5	3.2
Manitoba	2.9	3.8	1.3	1.9	4.3
Saskatchewan	3.1	3.1	3.1	1.8	3.0
Alberta	1.3	-3.5	5.4	1.6	3.9
British Columbia	3.5	3.5	2.1	2.4	6.0
Yukon	3.2	4.9	5.0	1.8	2.8
Northwest Territories	1.7	3.5	-2.6	-0.1	2.9

\* Data are not seasonally adjusted.

## Wholesalers Report Strong Increase in Sales

In September, seasonally adjusted sales by wholesale merchants totalled \$17.3 billion, up 1.9% from August and 7.6% above their September 1992 level. This was the fifth consecutive monthly increase.

Eight of nine trade groups recorded higher sales while a 0.1% decline was reported by wholesalers of motor vehicles, parts and accessories. The largest increase came from sales of machinery, equipment and supplies (other than farm machinery). Sales by this group, which account for 23% of total sales, grew by 3.6%. Within this trade group, there were higher sales of computers and related machinery, equipment and packaged software, and other electronic machinery.

Other increases were reported by wholesale merchants of lumber and building materials (3.3%), suppliers of food, beverage, drug and tobacco products (1.1%) and metals, hardware, plumbing and heating equipment and supplies (3.5%).

Eight of the provinces and the territories experienced higher sales. British Columbia wholesalers registered the strongest growth, up \$111 million or 4.6% from August and showed the largest year-over-year increase (20.2%).

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

## Retail Sales Edge Down After Rising for Two Months

Seasonally adjusted retail sales slipped by 0.1% in September to \$16.3 billion on the heels of a modest 0.4% increase in August and a 1.1% gain in July. Despite this, retail sales rose 1.0% in the third quarter of 1993, following increases of 0.8% in the second quarter and 1.8% in the first quarter. The retail sales trend has been increasing steadily since March 1992, but the pace slowed in September. Even so, sales were up 4.7% from a year earlier.

Ten of 16 major trade groups recorded lower sales in September. The food sector posted a 0.8% decrease due to slower sales by supermarkets and grocery stores (-0.8%). However, at \$3.9 billion, their sales level was up 2.6% from a year earlier.

Three of the four clothing components showed declines but the largest downward influence came from a 2.4% sales decrease for women's clothing stores.

Household furniture and appliance stores reported a 1.2% rise in sales which pushed sales up 10.3% from their September 1992 level. Sales in the automotive sector rose 0.5%, led by a 0.9% sales gain by motor vehicle and recreational vehicle dealers.

Retail sales fell in six provinces but on a year-over-year basis, sales were up in all provinces and territories except in Newfoundland (-1.6%). That province registered its first year-over-year decline in three months.

For further information, order *Retail Trade* (catalogue number 63-005), or contact Industry Division at (613) 951-9682.

## PROVINCIAL PERSPECTIVES

### Retail and Wholesale Trade, September 1993

Seasonally Adjusted

	Retail Sales		Wholesale Sales	
	\$ millions	% change from previous month	\$ millions	% change from previous month
Canada	16,270	-0.1	17,334	1.9
Newfoundland	278	-0.8	173	0.1
Prince Edward Island	71	-1.3	38	6.2
Nova Scotia	539	-0.1	388	4.5
New Brunswick	424	0.3	244	4.0
Québec	3,962	-0.3	4,112	1.6
Ontario	5,968	-0.1	7,177	1.4
Manitoba	559	0.5	555	-1.5
Saskatchewan	484	0.1	512	-2.1
Alberta	1,696	-0.5	1,613	1.9
British Columbia	2,237	0.2	2,500	4.6
Yukon	17	1.0	22	3.2
Northwest Territories	36	3.9		

## Exports Recover in September

The seasonally adjusted value of merchandise exports climbed by \$667 million in September to \$15.6 billion and recovered from a 0.4% decline posted in August. Increases were registered for most commodity groups, led by automotive products (\$317 million).

Seasonally adjusted imports rose by \$341 million to \$14.5 billion. As with exports, there were increases for virtually all commodity groupings, but it was the automotive sector which contributed most (\$311 million) to overall growth.

With a larger increase in exports, the merchandise trade balance grew by \$326 million in September to \$1.0 billion. The cumulative trade surplus for 1993 stood at \$8.8 billion compared to \$5.3 billion for the same period last year.

Trade with the United States remained strong with exports growing \$498 million and imports by \$186 million. As a result, Canada's trade surplus with the U.S. recovered over half of August's decline, rising by \$312 million to \$1.9 billion.

(continued on page 5)



## ... Exports Recover in September

### Note to Users

*Merchandise trade is only one component of the balance of payments. Other components include service transactions, investment income and transfers.*

*In the second quarter of 1993, the merchandise trade surplus of \$2.9 billion contrasted with a current account deficit of \$6.8 billion. Canada's second-quarter merchandise trade surplus of \$5.4 billion with the United States contrasted with a current account deficit of \$0.2 billion.*

### Underlying Trends

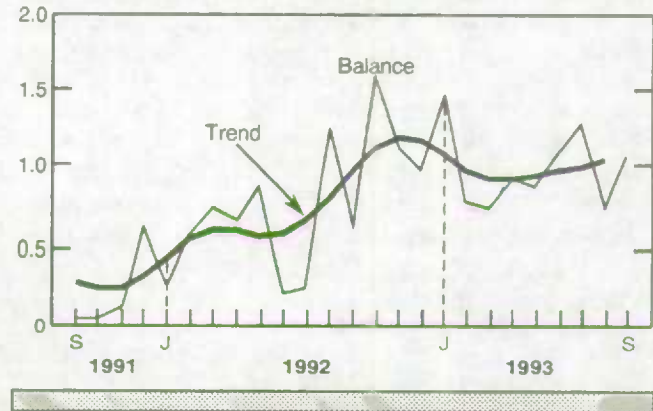
The exports trend has risen by 27.5% over the past 21 months, and now stands 14.4% above its level in August 1992. The strength has come mainly from trade with the United States; exports to the U.S. have risen by 19.2% in the last year.

The trend for agricultural and fishing products advanced for the seventh month in a row, aided in large part by higher exports of wheat which have increased by 15.6% over the past six months. The overall trend for automotive exports was up in August, but exports of trucks continued to decline. Car exports, on the other hand, now stand 42.5% above last year's level.

The trend for exports of energy fell for the first time in seven months while the trend for forestry products decreased for the sixth straight month.

### Merchandise Trade Balance

Billions of dollars, seasonally adjusted



For imports, the trend has been increasing for 20 months, and now stands 13.4% higher than in August 1992. The largest increases have been for imports from the U.S. (17.2%) and from non-OECD countries (17.4%).

For further information, order *Preliminary Statement of Canadian International Trade* (catalogue number 65-001P), or contact *International Trade Division* at (613) 951-9647. (See also "Current Trends" chart on page 8.)

## First National Survey on Male Violence Against Women

Between February and June, 1993, Statistics Canada conducted a national survey (excluding the Yukon and the Northwest Territories) on male violence against women, on behalf of Health Canada. Approximately 12,300 women 18 years of age and older were interviewed by telephone.

The results of this survey suggest that violence against women is widespread. More than half (51%) of Canadian women have experienced at least one incident of physical or sexual violence since the age of 16 and 25% of all women have experienced physical or sexual violence at the hands of a marital partner (marital partners include common-law relationships).

The survey also covers the generational cycle of violence, the role of alcohol, the physical and emotional effects of victimization, the use of weapons, the incidents reported to the police, the use of support services, women's perceptions of their personal safety and self-protection.

This is the first national survey of its kind anywhere in the world. A random sample of women were asked about their experience, whether or not they had reported to the police or anyone else. Only behaviour considered an offence under the Canadian *Criminal Code* was addressed in the survey.

For further information on the *Violence Against Women Survey*, contact the *Canadian Centre for Justice Statistics* at (613) 951-0599.

## Trusted Pension Funds Continue to Report Slower Asset Gains

Assets of trusted pension funds surpassed \$246 billion at the end of the second quarter of 1993, but the annual growth rate recorded a second-quarter low of 8.6%. Year-to-year growth of assets has been moderate since the first quarter of 1991. Still, a healthy increase in second-quarter net income, up 30% from a year earlier to \$5.9 billion, resulted in a year-over-year asset growth rate that surpassed those of the previous two quarters.

Trusted pension fund assets represent one of the largest pools of capital in Canada, second only to the financial assets of Canadian chartered banks. Data are based on a survey of 199 trusted funds that hold almost 88% of total assets.

Bonds continued to account for the largest percentage of total assets (45%). However, faced with the prevailing financial market conditions,

trusted pension fund managers chose to allot almost three-quarters of new investments to stocks, raising their proportion of total assets to its highest ever level (35%).

Investment income, representing 39% of total income, is the single largest component of fund income. Second quarter investment income declined on a year-over-year basis, held back by continuing low interest rates. In 1989 and 1990, when the bank rate ranged between 12% and 14%, second-quarter investment income grew at annual rates of 15% and 18%, respectively.

Fully 60% of the assets are held by public sector funds. Between the first and second quarters of 1993, assets in public sector funds increased 2.3% compared with 1.6% for those in the private sector.

*For further information, order Quarterly Estimates of Trusted Pension Funds (catalogue number 74-001) or contact Labour Division at (613) 951-4034.*

## NEW FROM STATISTICS CANADA



### National Income and Expenditure Accounts

This publication provides comprehensive income and expenditure estimates by economic sector.

Two feature articles are included. "National Income and Expenditure Accounts: Revised Estimates for the Period 1989-1992" examines the latest round of revisions to the accounts and discusses the revisions to Gross Domestic Product (GDP) growth rates since 1971. "International Price and Quantity Comparisons: Purchasing Power Parities and Real Expenditures, Canada and the United States" introduces time series estimates for purchasing power parities and real per capita expenditures for Canada compared with the United States for 53 categories of GDP. These are based on two benchmark studies undertaken by the OECD in 1985 and 1990.

*National Income and Expenditure Accounts, Annual Estimates, 1981-1992 (catalogue number 13-201, \$39) is now available. For further information, call (613) 951-3640 and ask for the client services officer, National Accounts and Environment Division.*



# PUBLICATIONS RELEASED FROM NOVEMBER 19 TO 25, 1993

Division/title of publication	Period	Catalogue Number	Price: Issue/Subscription		
			Canada (Cdn.\$)	United States	Other Countries
			US\$		
<b>AGRICULTURE</b>					
Livestock Statistics Updates	September 1993	23-603UE	144	173	202
The Dairy Review	September 1993	23-001	12.20/122	14.60/146	17.10/171
<b>CURRENT ECONOMIC ANALYSIS</b>					
Canadian Economic Observer	November 1993	11-010	22/220	26/260	31/310
<b>EDUCATION, CULTURE AND TOURISM</b>					
Education in Canada, A Statistical Review	1991-92	81-229	50	60	70
Financial Statistics of Education	1989-1990 Last Edition	81-208	39	47	55
<b>HOUSEHOLD SURVEYS</b>					
The Labour Force	October 1993	71-001	17.90/179	21.50/215	25.10/251
<b>INDUSTRY</b>					
Corrugated Boxes and Wrappers	October 1993	36-004	5/50	6/60	7/70
Department Store Sales and Stocks	August 1993	63-002	14.40/144	17.30/173	20.20/202
Electric Lamps (light bulbs and tubes)	October 1993	43-009	5/50	6/60	7/70
Electric Power Statistics, Capability and Load	1992	57-204	27	32	38
Mineral Wool Including Fibrous Glass Insulation	October 1993	44-004	5/50	6/60	7/70
Monthly Production of Soft Drinks	October 1993	32-001	2.70/27	3.20/32	3.80/38
Monthly Survey of Manufacturing	September 1993	31-001	17.30/173	20.80/208	24.20/242
Pack of Processed Peas	1993	32-235	13	16	18
Primary Iron and Steel	September 1993	41-001	5/50	6/60	7/70
Production and Disposition of Tobacco Products	October 1993	32-022	5/50	6/60	7/70
Production and Stocks of Tea, Coffee and Cocoa	Quarter ended September 1993	32-025	6.75/27	8/32	9.50/38
Refined Petroleum Products	August 1993	45-004	18.20/182	21.80/218	25.50/255
<b>INTERNATIONAL TRADE</b>					
Exports by Commodity	August 1993	65-004	55.10/551	66.10/661	77.10/771
Preliminary Statement of Canadian International Trade	September 1993	65-001P	10/100	12/120	14/140
<b>INVESTMENT AND CAPITAL STOCK</b>					
Building Permits	September 1993	64-001	22.10/221	26.50/265	30.90/309
<b>NATIONAL ACCOUNTS AND ENVIRONMENT</b>					
National Income and Expenditure Accounts	Annual Estimates 1981-1992	13-201	39	47	55
<b>PRICES</b>					
Consumer Price Index	October 1993	62-001	9.30/93	11.20/112	13/130
Industry Price Indexes	September 1993	62-011	18.20/182	21.80/218	25.50/255
<b>TRANSPORTATION</b>					
Air Carrier Traffic at Canadian Airports	October to December 1992	51-005	30.50/122	36.50/146	42.75/171

## CURRENT TRENDS

### Gross Domestic Product

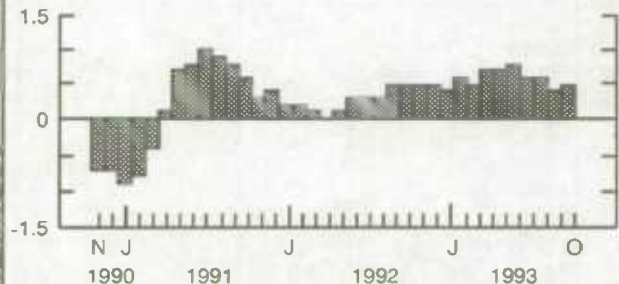
% change,  
previous month



Real gross domestic product at factor cost crept up 0.1% in August after slipping by 0.1% in July.

### Composite Index

% change,  
previous month



The growth of the composite index accelerated from 0.4% in September to 0.5% in October.

### Consumer Price Index

% change,  
previous year



The year-over-year increase in the all-items CPI was 1.9% in October. The food index rose by 1.5%, up from 1.2% in September.

### Unemployment Rate

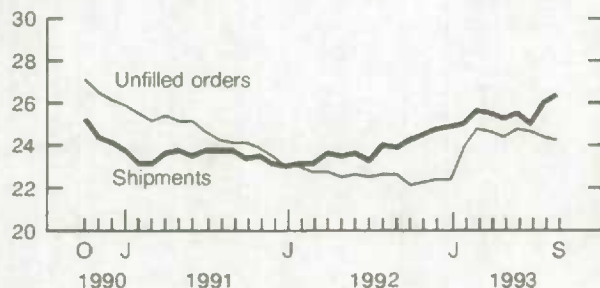
%



The unemployment rate slipped from 11.2% in September to 11.1% in October.

### Manufacturing

Billions  
of dollars



Canadian manufacturers' shipments increased 1.4% in September to \$26.3 billion. The level of unfilled orders fell 0.6% to \$24.2 billion, the fifth decline in six months.

### Merchandise Trade

Billions  
of dollars



In September, seasonally adjusted merchandise exports climbed 4.5% to \$15.6 billion, while imports increased 2.4% to \$14.5 billion.

**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)	August	517.3	0.1%	2.6%
Composite Leading Indicator (1981 = 100)	October	157.2	0.5%	7.1%
Operating Profits of Enterprises (\$ billion)	3rd Quarter*	13.0	-6.9%	23.8%
<b>DOMESTIC DEMAND</b>				
Retail Trade (\$ billion)	September*	16.3	-0.1%	4.7%
New Motor Vehicle Sales ('000 units)	September	97.0	-1.8%	-6.8%
<b>LABOUR</b>				
Employment (millions)	October	12.4	-0.2%	1.2%
Unemployment Rate (%)	October	11.1	-0.1	-0.2
Participation Rate (%)	October	64.9	-0.2	-0.4
Labour Income (\$ billion)	August	33.2	-0.1%	2.6%
Average Weekly Earnings (\$)	August	560.61	-0.1%	1.7%
<b>INTERNATIONAL TRADE</b>				
Merchandise Exports (\$ billion)	September*	15.6	4.5%	16.1%
Merchandise Imports (\$ billion)	September*	14.5	2.4%	13.4%
Merchandise Trade Balance (\$ billion)	September*	1.02	0.33	0.44
<b>MANUFACTURING</b>				
Shipments (\$ billion)	September	26.3	1.4%	10.8%
New Orders (\$ billion)	September	26.2	1.5%	10.3%
Unfilled Orders (\$ billion)	September	24.2	-0.6%	7.7%
Inventory/ Shipments Ratio	September	1.33	-0.02	-0.12
Capacity Utilization (%)	2nd Quarter	78.3	-0.2	3.3
<b>PRICES</b>				
Consumer Price Index (1986 = 100)	October*	130.9	0.2%	1.9%
Industrial Product Price Index (1986 = 100)	September	112.9	0.1%	2.7%
Raw Materials Price Index (1986 = 100)	September	112.0	-1.0%	2.3%
New Housing Price Index (1986 = 100)	September	136.6	0.1%	1.6%

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

*\* New this week.*



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**KEY RELEASE CALENDAR: DECEMBER 1993\***

Monday	Tuesday	Wednesday	Thursday	Friday
		<b>1</b> Financial Packages RRSP's, Savers, Investors, 1992 Help-wanted Index, November 1993 Crude Oil and Natural Gas, September 1993	<b>2</b> Industrial Capacity Utilization Rates, Third Quarter 1993 Short-term Expectations Survey	<b>3</b> Labour Force Survey, November 1993
<b>6</b> Household Facilities and Equipment, 1993	<b>7</b> Estimates of Labour Income, September 1993	<b>8</b>	<b>9</b> New Motor Vehicle Sales, October 1993 Farm Product Price Index, October 1993	<b>10</b> New Housing Price Index, October 1993 Department Store Sales by Province and Metropolitan Area, October 1993
<b>13</b>	<b>14</b> Travel Between Canada and Other Countries, October 1993 Income Distributions by Size, 1992	<b>15</b> Composite Index, November 1993 Building Permits, October 1993	<b>16</b> Preliminary Statement of Canadian International Merchandise Trade, October 1993 Monthly Survey of Manufacturing, October 1993	<b>17</b> Consumer Price Index, November 1993 Department Store Sales Advance Release, November 1993 Sales of Natural Gas, October 1993
<b>20</b> Canada's International Transactions in Securities, October 1993	<b>21</b> Retail Trade, October 1993	<b>22</b> Wholesale Trade, October 1993	<b>23</b> Employment, Earnings and Hours, October 1993 Unemployment Insurance Statistics, October 1993	<b>24</b> Real Gross Domestic Product at Factor Cost by Industry, October 1993 <b>MAJOR RELEASE DATES, January 1994</b>

\* Release dates for International Trade, the Consumer Price Index and the Labour Force Survey are fixed; dates for other data series may change.

**I·N·F·O·M·A·T****A Weekly Review**

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Editor: Louise Larouche (613) 951-1197  
Senior Editor: Greg Thomson (613) 951-1187

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