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A WEEKLY REVIEW

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Friday, December 17, 1993

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OVERVIEW

■ Merchandise Trade Balance Continues to Grow

After increasing by \$615 million in September, Canada's merchandise trade balance rose a further \$244 million in October to \$1.4 billion.

■ Mixed Results from Manufacturers

Canadian manufacturers' shipments increased a modest 0.2% in October while the backlog of unfilled orders fell for the fourth straight month.

■ Composite Index Continues to Show Strength

The economy improved markedly in November as all 10 components of the index were positive.

■ Planned Construction Activity Maintains Downward Trend

The seasonally adjusted value of building permits issued in Canada fell for the third straight month in October, this time by 4.1%.

■ Downward Trend in Cross-border Car Trips Continues

The seasonally adjusted number of same-day car trips by Canadian residents to the United States fell 2.2% in October to 3.8 million, and stood 14.6% below its level one year ago.

■ New Housing Price Index Edges Down

The New Housing Price Index for Canada (1986=100) declined marginally in October after four months of slow growth but was up 1.3% from its October 1992 level of 134.7.

This issue also includes information on average family income and trustee pension funds.

Merchandise Trade Balance Continues to Grow

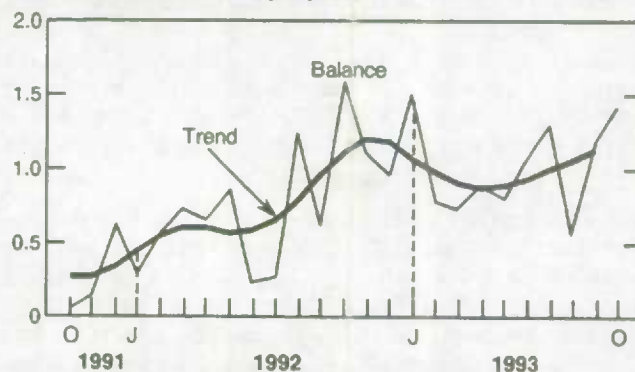
After increasing by \$615 million in September, Canada's merchandise trade balance rose a further \$244 million in October to \$1.4 billion. With exports to the United States up by \$392 million and imports up by \$250 million, Canada's trade surplus with the U.S. grew by \$142 million to \$2.2 billion.

Seasonally adjusted merchandise exports were up strongly for the second straight month, rising by \$501 million to \$16.1 billion. Increases were registered for all major commodity groups, led by automotive products (\$218 million).

(continued on page 2)

Merchandise Trade Balance

Billions of dollars, seasonally adjusted



Statistics
Canada

Statistique
Canada

Canada

... Merchandise Trade Balance Continues to Grow

Seasonally adjusted imports continued to increase for the third month in a row, by \$256 million in October to \$14.7 billion. The largest increases were in purchases of machinery and equipment (\$159 million), energy products (\$78 million) and automotive products (\$56 million).

Underlying Trends

The exports trend has risen by 30.5% since November 1991, and now stands 14.6% above its September 1992 level. The strength has come mainly from trade with the United States while the trend for exports to Japan declined for the third straight month.

The trend for agricultural and fishing products advanced for the eighth consecutive month, but exports of wheat remained 26.9% below their level of a year ago. The trend for exports of industrial goods increased for the fifth month in a row, despite declines for exports of metal ores which are now 8.9% lower than they were last year.

Note to Users

Merchandise trade is one component of the current account of Canada's balance of payments. Other components include service transactions, investment income and transfers.

In the third quarter of 1993, the merchandise trade surplus of \$3.0 billion contrasted with a current account deficit of \$6.3 billion.

For imports, the trend has been increasing for 21 months, and now stands 14.4% higher than in September 1992. Over the last year, the biggest increases have been for imports from the U.S. (17.9%) and from non-OECD countries (17.5%).

The trends increased for almost all commodity groupings, the exception being imports of energy products which declined for the fifth straight month.

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 9.)

Mixed Results from Manufacturers

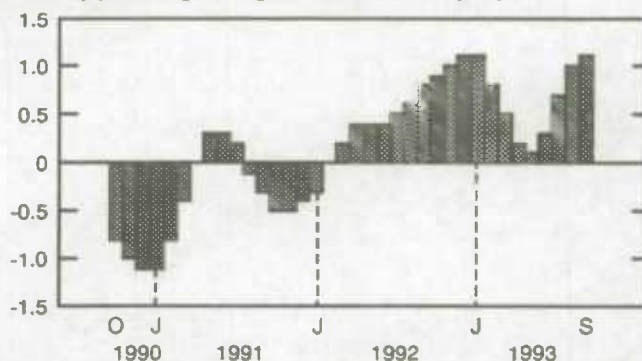
The seasonally adjusted value of Canadian manufacturers' shipments increased a modest 0.2% in October to \$26.4 billion, following large increases of 4.3% in August and 1.5% in September. Shipments for the first 10 months of the year amounted to \$255.1 billion, up 8.8% from the corresponding period in 1992.

Thirteen of 22 major industry groups reported increases, led by wood, fabricated metals and machinery. Several events weakened shipments in the motor vehicles, parts and accessories industries. Ford discontinued production of the Tempo/Topaz line and the plant will re-open only in January 1994 when production of the new Windstar minivan begins. At the General Motors Oshawa plant, car assembly ceased in mid-November for major retooling to the Lumina line and the re-introduction of the Monte Carlo model. Production is expected to recommence in February 1994.

The level of unfilled orders continued to decline for the fourth straight month, falling by 1.4% in October to \$23.8 billion. The backlog of unfilled orders has fallen \$880 million since June 1993, largely because of declines in the aircraft and shipbuilding industries. (Unfilled orders are a stock of orders which, if not cancelled, will contribute to future shipments.) Following two strong monthly increases, new orders declined 0.3% in October to \$26.1 billion.

Shipments

Monthly percentage change in trend, seasonally adjusted



Note: The short-term trend represents a weighted average of the data.

Inventory levels edged down again by 0.1% to \$35.0 billion. The steepest declines were in paper and allied products (-2.1%) and refined petroleum and coal products (-2.3%) industries. The inventories to shipments ratio remained unchanged at 1.33.

(continued on page 3)

... Mixed Results from Manufacturers

Trends

The trend for shipments slowed during the early part of 1993 but has accelerated since June and increased 1.1% in September. This advance reflected stronger shipment levels in the export-oriented industries, notably motor vehicles, parts and accessories, wood, and primary metals industries.

Composite Index Continues to Show Strength

The composite leading indicator continued to strengthen in November, rising by 0.7% from October. This increase follows gains of 0.4% in September and 0.5% in October. All 10 components of the index were positive as more indicators of final demand improved in recent months.

The indicators of household demand continued to grow steadily. The housing index advanced 0.4%, reflecting three straight gains for housing starts. House sales, however, were sluggish again in the third quarter and furniture and appliance sales followed suit with only modest growth (0.2%). Sales of durable goods continued to grow slowly, as they have since the second half of 1992.

The outlook improved markedly for the business sector. New orders for durable goods picked up, led by exports for the auto industry, while industries producing other durable goods also showed improvement. Further production gains are likely insofar as the ratio of manufacturing shipments to inventories has also increased. The ratio rose from

The trend for inventories continued to rise for the sixth consecutive month, although at a slower pace in August and September. For unfilled orders, the trend fell for the third month in a row after a year of growth. The trend for new orders rose for the third straight month after three months of declines.

For further information, order *Monthly Survey of Manufacturing* (catalogue number 31-001), or contact Industry Division at (613) 951-9832. (See also "Current Trends" chart on page 9.)

1.46 in August to 1.48 in September, a four-year high. Following these gains in demand, the average workweek lengthened for the first time since June, from 38.6 hours in October to 38.7 hours in November. Demand for business and personal services grew by 0.4%, with business demand accounting for most of the growth.

The financial market indicators maintained their vigour. The real money supply grew 1.0% while the stock market index rose 1.6%.

The U.S. leading indicator edged up by 0.1%. Strength in domestic spending was accompanied by an across-the-board improvement for manufacturing. Consumer confidence also rose to its highest level since April as employment was buoyant and inflation remained moderate.

For further information, order *Canadian Economic Observer* (catalogue number 11-010) or contact *Current Economic Analysis Division* at (613) 951-3627. (See also "Current Trends" chart on page 9.)

Planned Construction Activity Maintains Downward Trend

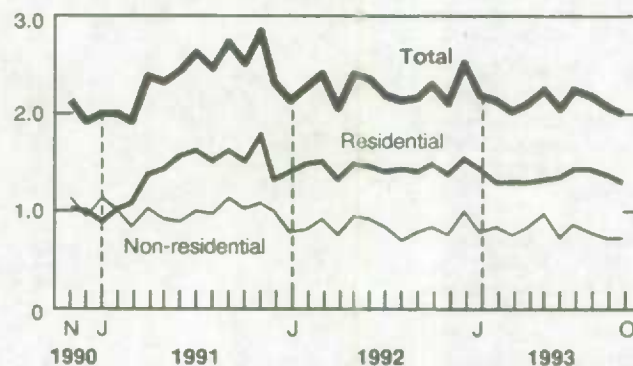
Following declines of 3.1% in August and 4.5% in September, the seasonally adjusted value of building permits issued in Canada fell a further 4.1% in October. British Columbia (-11.9%) and Ontario (-7.3%) accounted for the decrease. October's total of \$2.0 billion was 12.7% below the value of building permits issued in October 1992.

The value of residential building permits decreased 5.6% to \$1.3 billion after declining by 4.1% in September. Ontario (-11.7%) and British Columbia (-8.2%) reported the most significant declines while the Prairies (+5.7%) recorded the biggest increase.

The value of residential building permits for the January-October period dropped 6.4% from the same period in 1992. For that period, Ontario had the steepest drop (-16.4%) while British Columbia posted the largest rise (+5.0%).

Building Permits

Billions of dollars, seasonally adjusted



(continued on page 4)

... Planned Construction Activity Maintains Downward Trend

The value of residential building permits dropped sharply in October in the multi-family dwelling sector, down 12.3% to \$352 million. The downturn came mostly from Ontario (-34.3%), British Columbia (-11.8%) and the Atlantic region (-5.0%). Permits for single-family dwellings fell 2.8% to \$930 million due to the poor performance in these same regions.

In the non-residential sector, the value of building permits fell 1.2% to \$713 million, and was down 13.2% from a year earlier. The sharp decrease

of 19.3% reported by British Columbia more than offset the gains reported by all the other regions. The value of building permits for industrial projects plummeted 25.8% to \$116 million. The downturn came from the Atlantic region (-49.0%), Ontario (-46.8%) and British Columbia (-33.2%). Planned construction activity for institutional projects fell 2.9% to \$225 million while the value of building permits for commercial projects increased 11.6% to \$372 million.

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

Downward Trend in Cross-border Car Trips Continues

The number of same-day automobile trips to the United States by Canadian residents continued to decrease for the sixth straight month, falling by 2.2% in October to a seasonally adjusted level of 3.8 million. This marked the lowest level since December 1989. The trend in same-day cross-border car trips has been downward since February 1992, after having peaked at 5.3 million in November 1991.

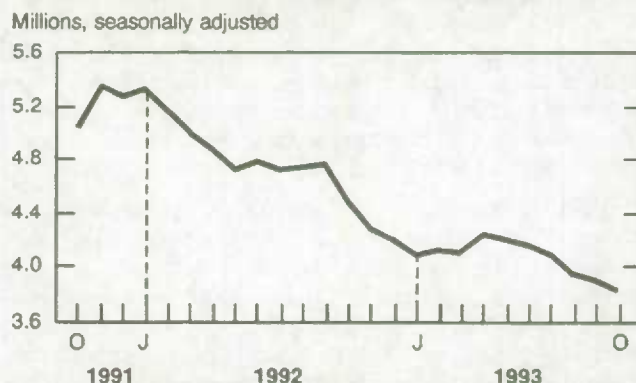
The downward trend in car trips of one or more nights to the U.S. also continued, decreasing 2.0% to 969,000. Meanwhile, car trips of one or more nights to Canada by residents of the United States fell 1.7% to 688,000.

International Travel Between Canada and Other Countries

October 1993, Seasonally Adjusted

| | ('000) | % change previous month | % change previous year |
|---------------------------------|--------------|-------------------------------|------------------------------|
| One or More Night Trips | | | |
| Non-resident Travellers: | | | |
| United States | 1,006 | -0.2 | 4.6 |
| Other Countries | 267 | 0.8 | 9.9 |
| Total | 1,273 | 0.0 | 5.7 |
| Residents of Canada: | | | |
| United States | 1,407 | -1.9 | -7.0 |
| Other Countries | 273 | -0.2 | 8.2 |
| Total | 1,680 | -1.6 | -4.9 |
| Auto Re-entries | | | |
| Residents of Canada: | | | |
| Same-day | 3,808 | -2.2 | -14.6 |
| Overnight | 969 | -2.0 | -11.2 |

Same-day Trips by Canadian Residents to the United States, by Automobile



Following a marginal decline of 0.4% in September, Canadian residents' trips of one or more nights to all countries (by all modes of travel) decreased a further 1.6% in October to 1.7 million. Both the U.S. and other countries shared in the decline.

The flow of foreign travellers to Canada remained unchanged in October. A decrease in the number of trips by Americans who stayed one night or more in Canada offset an increase in the number of trips by travellers from all other countries.

For further information, order *International Travel - Advance Information* (catalogue number 66-001P), or contact *Education, Culture and Tourism Division* at (613) 951-1791.

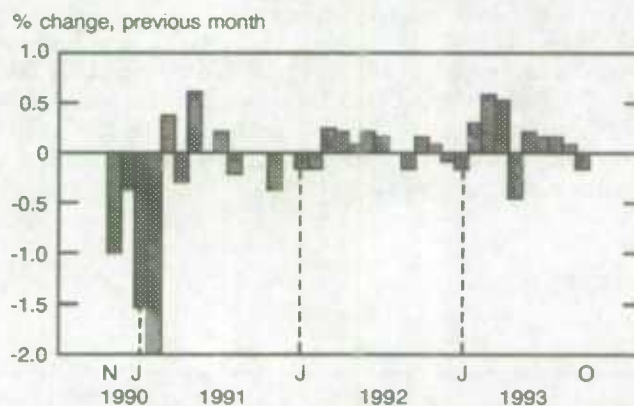
New Housing Price Index Edges Down

The New Housing Price Index for Canada (1986=100) edged down by 0.1% in October following four months of slow growth. At 136.4, the index was 1.3% above its October 1992 level of 134.7. Since January 1993, the year-over-year changes have ranged from 0.6% to 1.7%. Housing prices escalated throughout 1989, fell sharply in 1990 and early 1991, and then remained virtually unchanged until early in 1993, when they began creeping up.

The indexes for St. John's (-0.8%), Toronto (-0.7%) and Victoria (-0.7%) showed the steepest monthly declines, followed by Windsor (-0.6%) and Winnipeg (-0.5%). The index for Toronto, which accounts for over one-quarter of the Canada total index weight, stood 1.7% below its year-earlier level, continuing the series of year-over-year declines that began in April 1990 when the index stood at 180.0.

In Vancouver, the index edged up by 0.1% after a marginal decrease in September. The Vancouver index had the largest year-over-year increase (6.4%) in October, but the year-over-year changes have been decelerating since May. In Regina, the index showed an increase of 0.8% and a year-over-year growth rate of 5.0%.

New Housing Price Index



The House Only Index slipped 0.2% after two months of gains totalling 0.5%. At 125.8, the index was 1.3% above its year-earlier level, the ninth consecutive month to show a year-over-year advance. The Land Only Index slipped for the second straight month but was up 1.8% from its October 1992 level, the lowest year-over-year change recorded since May 1992.

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

Erosion of Average Family Income Slows

Canadians saw their average family income decrease for the third year in a row but the decline slowed in 1992. After adjustment for inflation as measured by changes in the Consumer Price Index, average family income fell 0.5% in 1992 to \$53,676 – about what it was in 1987 – following steep drops in 1990 (-1.6%) and 1991 (-2.6%). As a result, \$2,576 of the \$5,805 gained since the recession of the early 1980s has been eroded.

Various types of families showed only slight income growth in 1992. For two-parent families, income averaged \$60,246 in 1992, up from \$59,897 in 1991, following a decline of 4.3% from 1989 to 1991. Childless couples with one earner saw their income increase marginally from \$41,459 in 1991 to \$42,326 in 1992, after a drop of 10.0% from 1989 to 1991. Elderly couples, however, saw their income decline for the third consecutive year, falling to \$35,539 in 1992 from \$36,085 in 1991.

Average Family Income



(continued on page 6)

... Erosion of Average Family Income Slows

Coincident with the slight decline in average family income, there was a marginal increase in the size of the low-income population: the proportion of persons below Statistics Canada's low-income cutoffs advanced to 16.8% in 1992, up from 16.5% in 1991. There were 4.5 million low income persons in 1992, an increase of 139,000 persons from 1991. The number of children in poor families remained at 1.3 million, unchanged from 1991.

Weak labour market conditions in 1992 contributed partly to the small change in income levels. As well, there was no growth in full-year full-time employment in 1992, compared with a 4.8% reduction between 1989 and 1991. Meanwhile, the number of families where at least one member experienced some unemployment stopped increasing.

For further information, order Income Distributions by Size in Canada, 1992 (catalogue number 13-207) or contact Household Surveys Division at (613) 951-9775.

Pension Plan Assets Soar by 24%

The market value of assets held in trustee pension funds was estimated to be \$252.6 billion at the end of 1992, a sharp increase of 24% since 1990. This two-year growth rate surpassed those in 1988 and 1990 but was only about half the average growth rate posted in the early 1980s.

Since 1990, more than half the increase has been attributable to new investment in stocks. This was the first time that stocks were responsible for the largest proportion of a two-year increase in assets. As a result, from 1990 to 1992, investment in stocks increased by 43%, raising their proportion of total assets to its highest ever level (33%). Although the market value of bonds increased by only 20% over this period, bonds continued to represent the largest share of total assets (44%).

Assets were held by approximately 3,400 trustee funds. Nevertheless, 92% of the total assets were held by the 422 funds with more than 1,000 members, representing only 12% of the total number of trustee pension funds.

The number of active members of trustee pension plans reached 3.8 million, plus an undetermined number of persons who have retired or left their employment. This number is up 2.4% since 1990 and 116% since 1970. Assets per active member (in 1992 constant dollars) have risen to \$66,100 in 1992 from \$34,000 in 1982.

Net income totalled \$18.2 billion for 1992, up 21% from two years earlier - its largest two-year growth rate since 1986. Investment income, representing 48% of fund income, recorded its first decrease (-2.0%); in the past, the increase was always above 17%. The decline reflected lower interest rates.

For further information, order Trustee Pension Funds: Financial Statistics (catalogue number 74-201) or contact Labour Division at (613) 951-4034.

PUBLICATIONS RELEASED FROM DECEMBER 10 TO 16, 1993

| Division/title of publication | Period | Catalogue Number | Price: Issue/Subscription | | |
|--|---|------------------|---------------------------|------------------|--------------------|
| | | | Canada (Cdn.\$) | United States | Other Countries |
| | | | | | |
| | | | | | |
| CENSUS OF AGRICULTURE Trends and Highlights of Canadian Agriculture and its People | 1991 Census of Agriculture and 1991 Census of Population | 96-303ES | 29 | 35 | 41 |
| CURRENT ECONOMIC ANALYSIS Canadian Economic Observer | December 1993 | 11-010 | 22/220 | 26/260 | 31/310 |
| EDUCATION, CULTURE AND TOURISM Touriscope, International Travel, Advance Information, Vol. 9, No. 10 | October 1993 | 66-001P | 6.10/61 | 7.30/73 | 8.50/85 |
| HOUSEHOLD SURVEYS Income Distributions by Size in Canada | 1992 | 13-207 | 40 | 48 | 56 |
| INDUSTRY Energy Statistics Handbook | December 1993 | 57-601 | 300 | 360 | 420 |
| Factory Sales of Electric Storage Batteries | October 1993 | 43-005 | 5/50 | 6/60 | 7/70 |
| Oils and Fats | October 1993 | 32-006 | 5/50 | 6/60 | 7/70 |
| Pack of Processed Beans, Green and Wax | 1993 | 32-238 | 13 | 16 | 18 |
| Particleboard, Waferboard and Fibreboard | October 1993 | 36-003 | 5/50 | 6/60 | 7/70 |
| Pulpwood and Wood Residue Statistics | October 1993 | 25-001 | 6.10/61 | 7.30/73 | 8.50/85 |
| INDUSTRY MEASURES AND ANALYSIS Gross Domestic Product by Industry | September 1993 | 15-001 | 12.70/127 | 15.20/152 | 17.80/178 |
| INTERNATIONAL TRADE Exports by Commodity | September 1993 | 65-004 | 55.10/551 | 66.10/661 | 77.10/771 |
| Preliminary Statement of Canadian International Trade | October 1993 | 65-001P | 10/100 | 12/120 | 14/140 |
| LABOUR Employment, Earnings and Hours | September 1993 | 72-002 | 28.50/285 | 34.20/342 | 39.90/399 |
| Quarterly Estimates of Trusteed Pension Funds | Second Quarter 1993 | 74-001 | 11/44 | 13.25/53 | 15.50/62 |
| PRICES Farm Product Price Index | October 1993 | 62-003 | 7.10/71 | 8.50/85 | 9.90/99 |
| SERVICES, SCIENCE AND TECHNOLOGY Science Statistics Service Bulletin: The Provincial Research Organizations, Vol. 17, No. 10 | 1992 | 88-001 | 7.10/71 | 8.50/85 | 9.90/99 |
| TRANSPORTATION Passenger Bus and Urban Transit Statistics, Vol. 45, No. 10 | October 1993 | 53-003 | 7.10/71 | 8.50/85 | 9.90/99 |
| Railway Carloadings, Vol. 70, No. 10 | October 1993 | 52-001 | 8.30/83 | 10/100 | 11.60/116 |
| Railway Operating Statistics, Vol. 73, No. 9 | September 1993 | 52-003 | 10.50/105 | 12.60/126 | 14.70/147 |

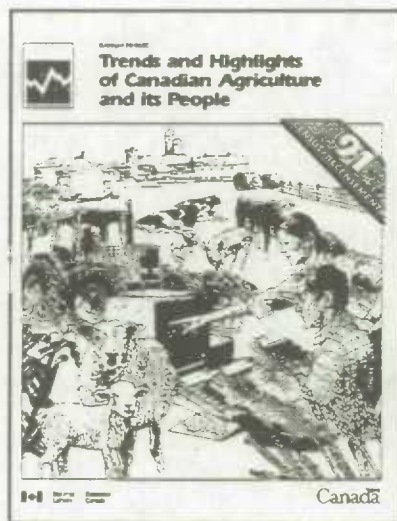
NEW FROM STATISTICS CANADA



Canadian Economic Observer

The December issue of *Canadian Economic Observer*, Statistics Canada's flagship publication for economic statistics, presents a monthly summary of the economy, the major economic events in November and a feature article on recent trends in Canadian direct investment abroad. A statistical summary contains a wide range of tables and graphs on the principal economic indicators for Canada, the provinces and the major industrial nations.

The December 1993 issue of Canadian Economic Observer (catalogue number 11-010, \$22/\$220) is now available. For more information, call Cindy Boskie (613-951-3634), Current Analysis Group.



Trends and Highlights of Canadian Agriculture and its People

The second part of this publication presents socio-economic analysis of the 1991 Census of Agriculture-Population Database. These data cover the education, occupation and mobility of farm operators. The text is supplemented by many graphs and tables.

This publication's first part (catalogue number 96-303E, \$29) was released in December 1992 in a binder; those who purchased it will automatically receive the second part free. The third and final part will be available in June 1994 and will present more analysis from the 1991 Census of Agriculture-Population Database on farm operators and their families. It also will be distributed at no charge.

The second part of Trends and Highlights of Canadian Agriculture and its People (catalogue number 96-303ES) is now available. For information, call Norah Hillary (613-951-8711 or 1-800-465-1991 in Canada), User Services Unit, Census of Agriculture, or if you did not purchase the first part, contact any Statistics Canada Regional Reference Centre.

CURRENT TRENDS

Gross Domestic Product

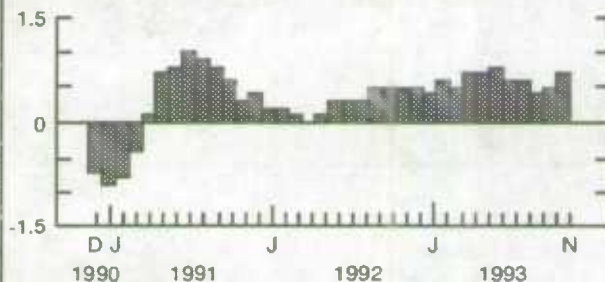
% change,
previous month



Real gross domestic product at factor cost grew by a sound 0.4% in September, boosting the value of goods and services produced during the month.

Composite Index

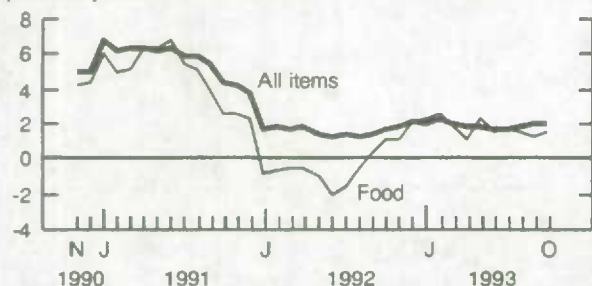
% change,
previous month



The growth of the composite index accelerated, rising from 0.4% in September to 0.5% in October, and then to 0.7% in November.

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 11.1% in October to 11.0% in November.

Manufacturing

Billions
of dollars



Canadian manufacturers' shipments edged up by 0.2% in October to \$26.4 billion. The level of unfilled orders fell 1.4% to \$23.8 billion, the fourth straight monthly decline.

Merchandise Trade

Billions
of dollars



In October, seasonally adjusted merchandise exports climbed 3.2% to \$16.1 billion, while imports increased 1.8% to \$14.7 billion.

Note: All series are seasonally adjusted except the consumer price index.



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LATEST MONTHLY STATISTICS

| | Period | Level | Change Previous Period | Change Previous Year |
|---|-------------|--------|------------------------------|----------------------------|
| GENERAL | | | | |
| Gross Domestic Product (\$ billion, 1986) | September | 520.2 | 0.4% | 3.0% |
| Composite Leading Indicator (1981 = 100) | November* | 158.4 | 0.7% | 7.4% |
| Operating Profits of Enterprises (\$ billion) | 3rd Quarter | 13.0 | -6.9% | 23.8% |
| DOMESTIC DEMAND | | | | |
| Retail Trade (\$ billion) | September | 16.3 | -0.1% | 4.7% |
| New Motor Vehicle Sales ('000 units) | October | 99.9 | 2.4% | -0.5% |
| LABOUR | | | | |
| Employment (millions) | November | 12.5 | 0.5% | 1.5% |
| Unemployment Rate (%) | November | 11.0 | -0.1 | -0.8 |
| Participation Rate (%) | November | 65.0 | 0.1 | -0.6 |
| Labour Income (\$ billion) | September | 33.4 | 0.4% | 2.8% |
| Average Weekly Earnings (\$) | September | 562.31 | 0.3% | 1.6% |
| INTERNATIONAL TRADE | | | | |
| Merchandise Exports (\$ billion) | October* | 16.1 | 3.2% | 15.1% |
| Merchandise Imports (\$ billion) | October* | 14.7 | 1.8% | 18.3% |
| Merchandise Trade Balance (\$ billion) | October* | 1.41 | 0.24 | -0.17 |
| MANUFACTURING | | | | |
| Shipments (\$ billion) | October* | 26.4 | 0.2% | 9.5% |
| New Orders (\$ billion) | October* | 26.1 | -0.3% | 10.2% |
| Unfilled Orders (\$ billion) | October* | 23.8 | -1.4% | 7.9% |
| Inventory/ Shipments Ratio | October* | 1.33 | 0.00 | -0.10 |
| Capacity Utilization (%) | 3rd Quarter | 78.6 | 0.2 | 3.1 |
| PRICES | | | | |
| Consumer Price Index (1986 = 100) | October | 130.9 | 0.2% | 1.9% |
| Industrial Product Price Index (1986 = 100) | October | 113.5 | 0.4% | 2.7% |
| Raw Materials Price Index (1986 = 100) | October | 112.6 | 0.4% | 3.7% |
| New Housing Price Index (1986 = 100) | October* | 136.4 | -0.1% | 1.3% |

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

* New this week.

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