Friday, January 8, 1999

OVERVIEW

Economic activity edged up in October

Economic activity edged up in October, sustained by post-strike recoveries in auto manufacturing, air transportation and education.

Retail sales slid

Retail sales fell virtually across the board in October, as retailers posted their lowest year-over-year increase in sales since August 1996.

Wholesalers posted strong sales

Wholesalers posted strong sales in October, spurred by sales of motor vehicles, parts and accessories.

◆ Securities investors eased up

Making a small investment, foreign investors returned to Canadian securities markets in October. Meanwhile, Canadians invested only a negligible amount in foreign securities.

Annual growth in average weekly earnings reached a high

In October, the annual growth rate of average weekly earnings climbed to the highest rate seen since May 1997.

Direct sales increased marginally in 1997

Consumers spent slightly more with direct sellers of merchandise in 1997 than they did in 1996. Sales resulting from personal selling rose most notably.

Economic activity edged up in 1999 October LIERARY BIBLIOTHEQUE

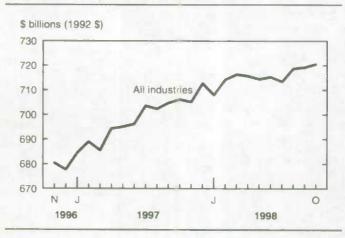
conomic activity edged up 0.2% in October, sustained in large part by rebounds from strikes by General Motors workers, Air Canada pilots and Ontario's teachers. Activity in wholesaling and in computer services also increased. This growth contrasted with a drop in retailing, continued declines in mining, and with a fall in demand at electric and gas utilities. Excluding auto manufacturing, air transportation and education, activity in the rest of the economy fell 0.3%.

October's growth in GDP was the third straight monthly increase following a four-month stretch of weakness. Growth in 1998, while generally maintaining an upward trend, has slackened considerably from 1997's steeper pace. The weakness so far this year has been concentrated in the goods-producing sector of the economy.

Manufacturing production increased for a third consecutive month in October (+0.7%) as automakers raised output again. Producers of chemicals and rubber products also boosted output in the month. These increases were partly offset by decreases in four major industry groups: primary metal products, machinery, fabricated metal products, and computers and other electronic equipment. Excluding the auto sector, manufacturing output fell 0.9% in October.

Gross domestic product at factor cost

HINTERNET



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Canadä^{*}

... Economic activity edged up in October

Production of autos and parts surged in October by 11.9%. The recovery in August from the General Motors strike in the United States stretched into October as the company and many of its suppliers raised output again in a bid to replenish inventories south of the border. Extra shifts and launches of new models by other companies also buoyed production.

Production of primary metal products dropped 5.2% in October, the largest monthly decrease in more than four years. Steel foundries and non-ferrous metal smelters and refiners curtailed production the most. Production difficulties and scheduled maintenance shutdowns were partly responsible for the decline.

As for machinery, output fell 4.1% — the sixth decline in eight months. Although a steep drop in the agricultural machinery industry was mainly due to temporary shutdowns, machinery output has followed a downward trend for over a year. Overall, production of machinery is off more than 18% from its October 1997 peak. Meanwhile, output of electrical and electronic products slipped 0.6% in October. Production of computers and other office machines fell the most, as industry restructuring continued.

The end of the Air Canada pilots' strike and extensive seat sales led a 2.8% increase in the transportation and storage services industry in October. Activity in the air transport industry soared 21.5%, surpassing August's pre-strike level by a wide margin. Trucking and rail transportation services, which had advanced during the September strike, edged up in October. In education services, meanwhile, output rose 1.6% as back-to-work legislation put an end to strikes and lockouts in several Ontario school districts at the end of September.

Note to readers

The gross domestic product (GDP) of an industry is the value added when labour and capital transform inputs purchased from other producers into outputs. Monthly GDP by industry is valued at 1992 prices. The estimates presented here are seasonally adjusted at annual rates. This article also includes data revisions extending back to the January 1992 reference period.

Excess supply and weak demand in world commodity markets led to a 1.6% fall in mining activity — the ninth decline so far in 1998. Production levels have dropped more than 8% from the peak levels reached at the end of 1997. Decade-low oil prices continued to erode drilling and exploration activity, while lower production of metals such as copper, nickel and zinc paralleled price declines for all three metals to new multi-year lows.

Warmer-than-usual weather led to another weak month for electric and gas utilities, as the industry's output fell 2.3% in October. Environment Canada reported that average temperatures in September, October and November were the warmest in decades. Temporary closures by large industrial users in October also contributed to the decline in demand for electrical power.

Available on CANSIM: matrices 4677-4681.

The October 1998 issue of Gross domestic product by industry (15-001-XPB, \$15/\$145) will be released shortly. For analytical information, contact Richard Evans (613-951-9145; evanric@statcan.ca). For information about purchasing data, contact Kim Lauzon (613-951-9417; lauzonk@statcan.ca), Industry Measures and Analysis Division. Also see "Current trends" on page 7.

Retail sales slid

etail sales declined in most trade groups, provinces and territories in October. Slow sales by vehicle dealers drove the decline. Following a 1.1% increase in September, retail sales were down 1.7% in October to \$20.6 billion.

Retail and wholesale trade, October 1998 Seasonally adjusted

	Retail sales		Wholesale sales		
	\$ millions	% change, previous month	\$ millions	% change, previous month	
Canada	20,580	-1.7	28,822	3.1	
Newfoundland	326	0.0	191	1.3	
Prince Edward Island	85	-3.4	46	-2.4	
Nova Scotia	636	0.4	479	-3.6	
New Brunswick	481	-3.3	329	-2.7	
Quebec	4,768	-0.7	5,682	1.2	
Ontario	7.830	-1.4	14,508	5.7	
Manitoba	725	-4.0	927	-5.2	
Saskatchewan	624	-4.8	836	8.0	
Alberta	2,303	-4.9	2.598	2.2	
British Columbia	2,735	-0.6	3,199	0.4	
Yukon	25	-6.0	11	-0.5	
Northwest Territories	43	-1.9	16	1.8	

It was retailers' lowest year-over-year increase in sales (+2.5%) since August 1996. However, excluding the vehicle dealers, retail sales would have been virtually unchanged from September (-0.1%). Only drugstores posted significant sales growth in October (+0.8%). Drugstore sales have generally been declining since the summer of 1998. Clothing stores also showed some growth in October (+0.2%). Though down 0.4% in October, retail sales in furniture stores have generally been growing since early 1996.

After advancing for more than two years, retail sales have been weakening since late spring of 1998. Sales have declined or stagnated in all trade groups except furniture stores. The strong growth earlier coincided with a significant rise in consumer credit. In 1998, increases in consumer credit have been less pronounced. High consumer debt, declining consumer confidence, and stagnant average weekly earnings may have hobbled sales recently.

Lower sales in October by motor and recreational vehicle dealers (-6.1%) led to a 4.0% decline in the automotive trade group. Sales by these dealers had picked up in August and September, coincident with incentive offers. These incentives were substantially reduced in October. Sales at gasoline service stations remained unchanged. Gasoline service stations have watched sales decline since the fall of 1997 due to depressed prices: sales were 8.7% lower than in October 1997. Retailers of auto parts, accessories and services (+1.6%) made the only increase in the group. However, those same retailers' sales have been flat since the start of 1998, after more than two years of growth.

(continued on page 3)

... Retail sales slid

Food stores followed a 1.0% increase in September with a 0.6% decline in October. Their sales have been weakening since June 1998. At general merchandise stores, sales slipped 0.4%, following a considerable increase of 2.7% in September. Sales by general merchandise stores have generally been flat since the spring of 1998.

The only province where retail sales grew in October was Nova Scotia (+0.4%). In Newfoundland, sales were unchanged after increasing by 4.2% in September. Newfoundland and Nova Scotia are the only two Atlantic provinces where sales have been on the increase in the last 12 months (to October). The largest sales declines in October were in the Prairie provinces. Low commodity prices may have affected consumer spending there. More than three-fourths of the decline in the Prairies was in the automotive trade group. In Alberta, where retail sales have advanced slowly since the start of 1998, sales fell or remained unchanged in all trade groups in October. In Saskatchewan, sales fell overall despite increases in general merchandise stores, furniture stores and in retail stores "not elsewhere classified". Saskatchewan's retailers have seen declining sales since the end of 1997. In Manitoba, the automotive group pulled total retail

sales down. Consumer spending in Manitoba flattened out in 1998.

In Ontario, retailers continued to do well compared with most other provinces. Retail sales in the province were 6.0% higher in October than a year earlier, well above the 2.5% annual growth found at the national level. All retail trade groups in Ontario are still growing their sales, except for some weakness in the last few months at food stores and at drugstores. Retail sales in Ontario have been growing since mid-1996. In Quebec, retail sales were 3.0% higher than a year earlier despite October's decline. Sales in Quebec have been relatively flat since March 1998. Consumers in British Columbia continued to stay away from stores, so retailers reported their third consecutive monthly sales decline. Sales in the automotive trade group and in food stores declined the most. Total retail sales in British Columbia have been on the decline since the end of 1997.

Available on CANSIM: matrices 2299, 2398-2417 and 2420.

The October 1998 issue of **Retail trade** (63-005-XPB, \$21/\$206) is now available. For more general information, contact Client Services (613-951-3549; 1 877-421-3067; logener@statcan.ca). For analytical information, contact Paul Gratton (613-951-3541; gratpau@statcan.ca). Distributive Trades Division.

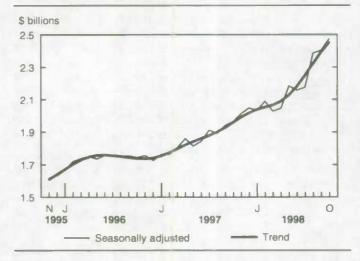
Wholesalers posted strong sales

holesalers posted sales of \$28.8 billion in October (+3.1%), spurred by significant increases in motor vehicles, parts and accessories (+9.5%) and in computers, packaged software and other electronic machinery (+9.0%). All wholesale trade groups reported higher sales except household goods (-2.2%), apparel and dry goods (-1.3%), and "other products" (0.0%). Following a period of general declines that started at the end of 1997, wholesale sales have been steadily climbing since July 1998. Gains in sales since July are now reminiscent of the period of strong growth reported by wholesalers in early 1997.

Climbing 9.5%, sales of motor vehicles, parts and accessories were one of the driving forces behind wholesalers' strong sales in October. October's strong showing may have been due to three factors: 1) the general increase in North American car production in the latter half of 1998, 2) the anticipation of brisk demand for more profitable, big-ticket vehicles such as sport-utility vehicles and mid-size cars, and 3) a growing export market for Canadian-made parts destined to Japanese companies. Since August, wholesale sales of motor vehicles, parts and accessories appear to be rebounding.

Sales of farm machinery, equipment and supplies remained sluggish despite October's gain. Following heavy sales declines in August (-18.7%) and September (-6.3%), wholesalers of farm machinery, equipment and supplies reported sales of \$681 million in October (+4.5%). Incentives offered by major suppliers of farm machinery may have contributed to this increase. However, sales have been falling since the start of 1998 and remain well below the \$855 million reported in July. Limited global markets, low commodity prices, and the threat of trade sanctions by the United States continued to affect this trade group.

Inventories of beverage, drug and tobacco products



Wholesalers of food products and of beverage, drug and tobacco products both grew their sales by 0.5% in October. Although a levelling-off occurred during 1997, wholesale sales of food products have been generally climbing for the last three years. Beverage, drug and tobacco sales had levelled off since the latter half of 1997.

Inventories held by wholesalers in October rose 0.5% to \$41.3 billion. Notably, inventory values for beverage, drug and tobacco products climbed a further 3.0% from September. In this trade group, the value of inventories started rising sharply in May 1998, coincident with a flattening of beverage, drug and tobacco product sales. Overall, the wholesalers' inventory-to-sales ratio fell from

(continued on page 4)

... Wholesalers posted strong sales

1.47 in September to 1.43 in October. The ratio reached a peak in August and in September 1998.

Most notable among the provinces, a 5.7% advance in Ontario was concentrated in the computer, packaged software and other electronic machinery trade group, as well as in motor vehicles, parts and accessories. Wholesalers in British Columbia continued their slow recovery with a third consecutive monthly increase in October (+0.4%).

Available on CANSIM: matrices 59, 61 and 648-649.

The October 1998 issue of Wholesale trade (63-008-X1B, \$14/\$140) is now available only on the Internet at www.statcan.ca. For general enquiries, or to order data, contact Client Services (613-951-3549 or 1 877 421-3067). For further analytical information, contact Alexander Hays (613-951-3552; haysale@statcan.ca), Distributive Trades Division.

Securities investors eased up

n October, foreign investors returned to Canadian securities markets, making a small net investment. This followed a record sell-off in September. Meanwhile, Canadian investors bought only a negligible amount of foreign securities. They had made a significant foreign investment in September.

Foreign investors were net buyers of Canadian bonds in October, but were sellers of Canadian stocks and money market paper. Foreign investors increased their holdings of bonds by \$2.6 billion. They had divested themselves of a large \$5.4 billion worth in September. Two main factors contributed to this turnaround. First, new issues in foreign markets rebounded to \$4.0 billion in October. Second, retirements of foreign-held Canadian bonds fell sharply from September's exceptional high of \$5.0 billion.

In the stock markets, foreigners lightened their holdings of Canadian stocks for a second consecutive month (-\$2.9 billion in September; -\$1.2 billion in October). On the secondary market, they were net sellers of \$7.8 billion of Canadian shares from June to October. However, over the same period they more than offset that selling by making significant investments in new equity issues here, mainly in the form of direct acquisitions. Investors from the United States accounted for the bulk of the period's secondary market sales (\$6.7 billion). The balance was spread between European and other foreign investors.

After increasing their holdings of foreign bonds (bonds denominated in foreign currencies) by a record \$2.4 billion in September, Canadians bought only a small amount of overseas bonds in October. Meanwhile, Canadian investors were net

Note to readers

In October, the differential on short-term interest rates held in favour of investing in Canada (at around 60 basis points) for a second straight month. On long-term rates, the differential held at around 30 basis points, continuing to favour investment in Canada for a third straight month.

Canadian stock prices (as measured by the TSE 300 composite index) rallied sharply in October, adding 10.6% to September's small gain. In the United States, stock prices (as measured by the Standard and Poor's 500 index) also recorded a strong gain in October, adding a further 8.0% to September's 6.2% gain.

The dollar, meanwhile, resumed its downtrend in October, losing half a cent to close at 64.81 U.S. cents.

sellers of a small amount of foreign stocks, mainly overseas (not U.S.) shares. Canadians' investment in foreign stocks has shown little change for three consecutive months now (to October). By contrast, they went on a heavy buying spree in the nine months ended September—nearly \$13 billion worth—as the Canadian dollar weakened.

Available on CANSIM: matrices 2328-2330, 2378-2380 and 4195.

The October 1998 issue of Canada's international transactions in securities (67-002-XPB, \$18/\$176) will be available shortly. For further information, contact Don Granger (613-951-1864), Balance of Payments and Financial Flows Division.

Annual growth in average weekly earnings reached a high

n October, the annual growth rate of average weekly earnings climbed to 2.0% — the highest growth rate seen since May 1997 (+2.6). Throughout 1998, the annual growth rate of average weekly earnings has ranged between 1.0 and 2.0%. Average weekly earnings rose in October by \$3.81 to \$608.44. The average workweek for hourly-rated employees stood at 31.1 hours (including overtime), unchanged from September and also unchanged from October 1997. Overtime hours were virtually the same as in September.

In October, hourly-rated employees enjoyed a substantial gain in hourly earnings (including overtime), which rose \$0.17 from

Average weekly earnings, all industries, October 1998 Seasonally adjusted

	\$	% change, previous month	% change, previous year
Canada	608.44	0.6	2.0
Newfoundland	537.32	1.7	2.9
Prince Edward Island	481.31	0.7	4.3
Nova Scotia	513.84	1.7	2.0
New Brunswick	528.87	0.8	-0.2
Quebec	571.57	0.9	0.7
Ontario	650.19	1.2	2.5
Manitoba	548.86	0.7	4.2
Saskatchewan	543.56	0.9	2.3
Alberta	615.01	0.7	2.1
British Columbia	621.01	0.1	1.5
Yukon	664.74	-0.5	-8.5
Northwest Territories	720.75	-0.4	-1.3

September to an average of \$15.18. This was up 1.7 % from October 1997.

The number of employees on payrolls made a significant gain in September and followed that with an increase in October of 26,000. There were small advances in payroll employment in about half the major industries. Business services led the way (+0.7%), as it did in September (+1.1%). Employers in this sector continue to add employees to their payrolls at a rapid rate. In fact, from January to October 1998, the sector's payroll swelled with more than 47,000 new employees.

These estimates of employment, earnings and hours are now derived from administrative records; in addition, a new sample was drawn for the Business Payrolls Survey to produce estimates of paid hours, average weekly earnings and average hourly earnings. Estimates derived from administrative records may show a different seasonal pattern than the previous data, which were derived from survey questionnaires. This can only be assessed within the context of a longer time period. Statistics Canada will continue to monitor these impacts and will help users interpret its data. It is recommended that data from the Survey of Employment, Payrolls and Hours, particularly the employment data, be used in the context of longer time periods for detailed industry distributions. A description of the methodological changes and their impacts on the data was published in the May 1998 issue of Employment, earnings and hours.

Available on CANSIM: matrices 4285-4466, 9438-9452, 9639-9664 and 9899-9911.

The October 1998 issue of Employment, earnings and hours (72-002-XPB, \$32/\$320) will be available shortly. The historical publication Annual estimates of employment, earnings and hours 1985-1997 (diskette: 72F0002XDB, \$120) is on sale now. Custom tabulations of the data are available on demand. For further information, contact Jean Leduc (613-951-4090; fax: 613-951-4087; labour@statcan.ca), Labour Division.

Direct sales increased marginally in 1997

n 1997, consumers purchased \$3.4 billion worth of merchandise from direct sellers operating in Canada, a marginal 0.3% increase from 1996. By comparison, in-store retail sales excluding the auto sector advanced 5.9% over the same period to reach \$144.5 billion.

Newspapers were the direct sellers' largest-selling commodity in both 1996 and 1997, accounting for 14.7% and 15.7% of total direct sales respectively. After declining 3.0% in 1996, direct sales of newspapers rebounded in 1997, climbing 6.9%. Consumers' direct purchases of cosmetics rose 11.9% in 1996 and grew another 6.0% in 1997. However, after spending 3.5% more in 1996, consumers spent less on books and encyclopedias via direct selling in 1997 (-7.1%). Direct sales of audiotapes,

compact discs and audio equipment declined in both 1996 (-7.8%) and 1997 (-8.9%).

Consumers opened their doors more frequently to direct sellers of merchandise in both 1996 and 1997. Sales via personal selling — such as group demonstrations at house parties — increased 3.7% in 1996 and 3.1% in 1997. After inching ahead 0.5% in 1996, sales by mail or telephone declined 0.7% in 1997. Other methods of direct selling, such as sales from manufacturing premises and from regular home delivery, were less popular: both declined in 1996 (-2.4%) and in 1997 (-0.8%).

Available on CANSIM: matrix 34.

For general information, or to order data, contact Client Services (613-951-3549; 1 877-421-3067, logener@statcan.ca). For further analytical information, contact Serge Gervais (613-951-9218), Distributive Trades Division.

New from Statistics Canada

Education in Canada: Recent trends and future challenges 1991 Census

Education in Canada: Recent trends and future challenges is the third in a series of census monographs recently released by Statistics Canada. These monographs provide substantive, in-depth analysis of selected themes, demonstrating the power and value of census data.

Schooling has become increasingly significant for individuals and for Canadian society. More and more, education at the post-secondary level has become the most influential factor in accessibility to the labour force, with more Canadians pursuing an education beyond secondary school. This monograph shows that the type of post-secondary institutions people attend and the programs they choose influence their ability to find work. The report also examines educational inequality, looking at accessibility to and participation in the education system.

Education in Canada: Recent trends and future challenges (96-321-MPE, No. 3, \$34.95) is now available. For further information on this series of monographs, contact Gustave Goldmann (613-951-1472; goldgus@statcan.ca), Housing, Family and Social Statistics Division. To order, call 1 800-700-1033, or order online at order@statcan.ca.

Crime and police resources in municipalities 1997

This report provides information on police personnel, expenditures and crime statistics for each municipal police force in Canada. It allows the reader to compare municipalities using key policing indicators, such as population per police officer, per capita cost, Criminal Code incidents per police officer, as well as violent, property and total crime rates and clearance rates.

Crime and police resources in Canadian municipalities, 1997 (paper: 85-223-XPE, \$32, Internet: 85-223-XIE, \$24) is now available. For further information, contact Information and Client Services (613-951-9023; 1 800-387-2231), Canadian Centre for Justice Statistics.

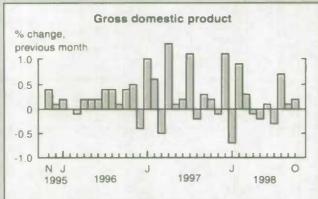
Private security and public policing in Canada 1996

Private security personnel continue to outnumber police officers in Canada. In 1996, there were roughly 59,000 police officers in Canada, compared with 82,000 private security personnel. The number of private security personnel increased by 1% between 1991 and 1996, whereas the number of police officers dropped by 4%. Generally, private security personnel are responsible for the protection of their client and/or their client's property, whereas police officers are responsible for the safety and security of the public. In recent years, however, the line between the two has become blurred.

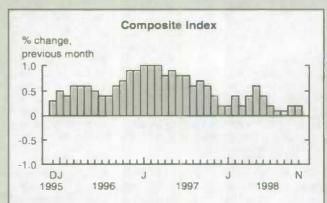
This report compares the roles and responsibilities of private security personnel and police officers, as well as their education and training. Data from the 1991 and 1996 Censuses of Population and Housing are used to provide counts for police officers and private security personnel. These sources also yield data on characteristics such as age, sex, education, average income, proportion of visible minorities and aboriginal persons. For the purposes of this report, private security personnel includes both private investigators and security guards.

Juristat Vol. 18, no. 13: Private security and public policing in Canada (paper: 85-002-XPE, \$10/\$93; Internet: 85-002-XIE, \$8/\$70) is now available. For further information, contact Information and Client Services (613-951-9023 or 1 800 387-2231), Canadian Centre for Justice Statistics.

Current trends



Economic activity edged up 0.2% in October, doubling September's 0.1% pace.



In November, the leading indicator grew 0.2%, maintaining the marginal growth it has shown since June.



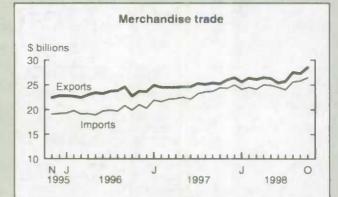
Consumers paid 1.2% more for goods and services in November 1998 than they did a year earlier. Food prices rose 1.6%.



In November, the unemployment rate notched down 0.1 percentage points to 8.0%.



Manufacturers' shipments rose 2.1% in October to \$38.3 billion. The level of unfilled orders jumped 2.6% to \$49.1 billion.



In October, the value of merchandise exports jumped 4.2% from September to \$28.5 billion. Imports advanced 2.9% to \$26.5 billion.

Note: All series are seasonally adjusted except the Consumer Price Index.

Latest statistics					
	Period	Level	Change, previous period	Change, previous year	
GENERAL				RETURNS	
Gross domestic product (\$ billion, 1992)	October	720.5	0.2%	2.0%	
Composite Index (1981=100)	November	208.6	0.2%	3.5%	
Operating profits of enterprises (\$ billion)	Q3 1998	25.6	3.7%	- 9.1%	
Capacity utilization (%)	Q3 1998	83.5	- 0.6†	- 1.2†	
DOMESTIC DEMAND					
Retail trade (\$ billion)	October	20.6	- 1.7%	2.5%	
New motor vehicle sales (thousand of units)	October	111.9	- 10.9%	- 7.2%	
LABOUR					
Employment (millions)	November	14.54	0.7%	3.4%	
Unemployment rate (%)	November	8.0	- 0.1†	- 1.0+	
Participation rate (%)	November	65.6	0.4†	0.7†	
Labour income (\$ billion)	September	38.9	0.1%	3.0%	
Average weekly earnings (\$)	October	608.44	0.6%	2.0%	
INTERNATIONAL TRADE					
Merchandise exports (\$ billion)	October	28.5	4.2%	13.0%	
Merchandise imports (\$ billion)	October	26.5	2.9%	8.6%	
Merchandise trade balance (all figures in \$ billion)	October	2.0	0.5	1.2	
MANUFACTURING					
Shipments (\$ billion)	October	38.3	2.1%	3.9%	
New orders (\$ billion)	October	39.5	4.1%	3.1%	
Unfilled orders (\$ billion)	October	49.1	2.6%	18.5%	
Inventory/shipments ratio	October	1.31	- 0.03	0.02	
PRICES					
Consumer Price Index (1992=100)	November	109.0	0.0%	1.2%	
Industrial Product Price Index (1992=100)	November*	120.3	0.0%	0.3%	
Raw Materials Price Index (1992=100)	November*	105.2	- 2.5%	- 14.9%	
New Housing Price Index (1992=100)	October	100.2	0.1%	1.0%	

Note: All series are seasonally adjusted with the exception of the price indexes.

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^{*} new this week

[†] percentage point

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CULTURE, TOURISM AND THE CENTRE FOR EDUCATION STATISTICS				
Focus on culture	Autumn 1998	87-004-XPB	9/27	9/27
MANUFACTURING, CONSTRUCTION AND ENERGY				
Steel wire and specified wire products	October 1998	41-006-XPB	7/62	7/62
PRICES				
Consumer prices and price indexes	Jan. to March 1998			
Internet		62-010-XIB	19/62	19/62
Paper		62-010-XPB	25/83	25/83
SERVICES				
Restaurant, caterer and tavern statistics	May to Dec. 1997	63-011-XPB	8/73	8/73

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