



Infommat

A Weekly Review

Friday, June 4, 1999

OVERVIEW

◆ Raw material prices climb for second consecutive month

Driven by crude oil, raw material prices climbed for a second consecutive month in April, rising 4.9%.

◆ Industrial product prices unchanged

Industrial product prices in April were unchanged from March overall and stood 0.8% above their level of a year earlier. Once again, the Canada-U.S. exchange rate significantly lifted the industrial product price level.

◆ Canadian investors focus again on U.S. markets

In March, the focus of Canadian investors' foreign buying was once again U.S. stocks and U.S. treasury bonds. Meanwhile, foreign investors continued to cut their holdings of Canadian stocks, bonds and money market paper.

◆ Weekly earnings virtually unchanged

Employees' average weekly earnings in March stood at \$605.47, virtually unchanged from February and at about the same level as in March 1998.

◆ Fewer Canadians receiving employment insurance

In March, fewer Canadians received the regular benefits from employment insurance. The decline was particularly evident in Ontario.

◆ Farm cash receipts down slightly in first quarter

In the first quarter, farm cash receipts were down a slight 0.4% from the same quarter a year earlier. Even so, receipts remained 4.0% above the first-quarter average of the past five years.

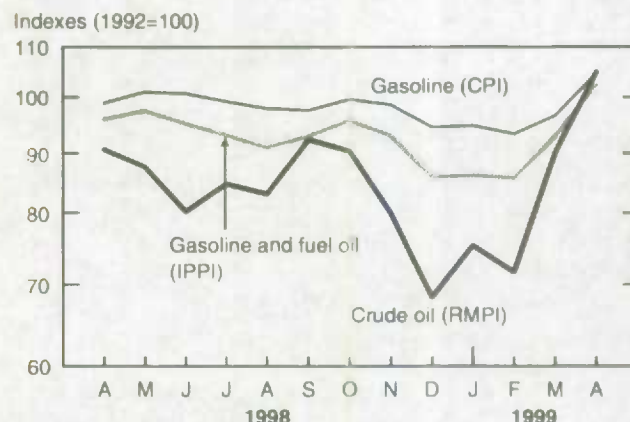
Raw material prices climb for second consecutive month

Driven by crude oil, raw material prices climbed for a second consecutive month in April, rising 4.9%. Overall, higher prices for crude oil, non-ferrous metals, wood and animal products were marginally offset by lower prices for vegetable products and ferrous materials. In April, raw material prices showed a positive yearly change (+0.4%) for the first time in more than two years. However, this was primarily caused by the recent price increases for crude oil. If mineral fuels were excluded, raw material prices for April would have risen just 1.0 % from March, and the 12-month change would have been negative (-5.0%).

After reaching a 10-year low in December, crude oil prices picked up considerably in March and April (+39.3%), but they still are well below the December 1996 peak. Coal prices also strengthened in April (+1.9%), whereas natural gas prices remained unchanged. On a yearly basis, mineral fuel prices rose 15.6%—the largest annual increase in more than two years. All three components of mineral fuels advanced on the year, with the largest gains occurring in crude oil (+16.0%) and natural gas (+18.1%).

Non-ferrous metal prices climbed in April by 3.0%—the first increase in five months. Copper concentrate prices increased

Fuel prices



(continued on page 2)

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and the INTRANET mirror site
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... Raw material prices climb for second consecutive month

6.4% amid signs that demand is firming up. The perception is that stronger Asian economies could help to erode existing copper stockpiles. At the same time, potential cutbacks in Chile and the United States could threaten supply. Aluminum material prices were also up (+9.8%), partly on the strength of American demand. In contrast, gold prices dropped 4.0%, to their lowest level in more than a year, amid concern over potential sell-offs by central banks and the International Monetary Fund. Following two months of gains, zinc concentrate prices declined 2.5%, while nickel prices edged down for the first time this year. Despite this April's upturn, non-ferrous metal prices remained 10.5% below April 1998 levels.

Wood prices gained 1.3% due to an increase in log prices of 2.1%. Log prices were buoyed by the prospect of a revitalised Asian market. In contrast, lumber prices declined 0.6%. Pulpwood prices slipped 1.2% as excess newsprint production put downward pressure on prices. On a 12-month basis, wood prices were 2.8% higher than in April 1998—the first such increase in more than a year. Pulpwood prices have remained relatively flat over the last few years, staying 27.4% below their most recent peak in July 1995.

Prices for animal products edged up from March by 1.4%. Higher hog prices (+13.3%) were partly offset by lower prices for cattle (-1.7%). Hog prices, which tumbled 66.9% in the second half of 1998, have been recovering throughout most of 1999. A smaller than expected increase in the frozen pork supply, combined with a lower hog count on U.S. farms, raised concerns that supplies may dwindle as demand peaks this summer. Despite the recent rally, hog prices still stood 8.9% below their levels of a year earlier and 46.8% below the August 1996 peak. Meanwhile, cattle prices edged down 1.7% amid signs that the number of cattle sent to feedlots should provide plenty of beef for this

summer's barbecue season. Cattle prices have remained relatively stable over the past few years. In general, animal product prices have been following a downward trend since August 1997. This is reflected in April's 12-month change for the group (-1.9%). Fish prices were more robust, posting an 8.3% yearly increase.

Vegetable product prices declined in April by 2.1%. Unrefined sugar prices fell a further 13.9% on news that Brazil, the largest grower, is producing a record sugar cane crop. Meanwhile, Russia, a major sugar buyer, has recently reduced imports and its demand is not expected to pick up anytime soon. Unrefined sugar prices, which have been steadily losing ground for the past three months, remained 33.2% below January's level.

Coffee prices weakened 4.7% in April amid speculation that Colombia will devalue its currency in order to boost exports at a time when Brazil is already adding to the extensive coffee stockpiles. At the same time, demand is beginning to wane as consumption usually slows in the summer. Coffee prices have fallen dramatically over the past two years, tumbling 62.2% below their peak of June 1997.

Prices dropped for both canola (-2.1%) and soybeans (-3.6%). Ideal growing conditions in the United States, together with Brazil's competitive pricing, have put downward pressure on soybean prices. Similarly, ideal growing conditions also weakened wheat prices (-0.7%). After peaking in May 1996, wheat prices have been following a downward trend, falling 46.3% to date.

Vegetable product prices were down 14.6% over the year, the result of widespread price declines, as producers of many of the commodities reaped bumper crops that overwhelmed demand.

Available on CANSIM: matrices 1879.

The April 1999 issue of Industry price indexes (62-011-XPB, \$22/\$217) will be available at the end of this month. For further information, contact Client Services (613-951-3350; fax (613-951-1539; infounit@statcan.ca), Prices Division.

Industrial product prices unchanged

Industrial product prices in April were unchanged from March overall and stood 0.8% above their level of a year earlier. Among the offsetting price movements in April, the most significant increases were for refined petroleum products and for primary meat products, while the most significant declines were for exported motor vehicles and newsprint.

Once again, the Canada-U.S. exchange rate significantly lifted the industrial product price level on both a monthly and a yearly basis. This occurred even though the value of the U.S. dollar weakened somewhat against the Canadian dollar, falling back to C\$1.49 in mid-April from C\$1.53 in mid-March.

Prices of refined petroleum products jumped in April by another 9.1%. Also in April, crude oil prices paid by manufacturers jumped 16.7%. April's jump in crude prices followed a 25.6% spike in March. Prices had edged down in February. At the same time, as shown by the Consumer Price Index, consumers paid more for gasoline in April (+8.5%) after a 3.5% increase in March. Prices at the pumps had declined in February.

Note to readers

The Industrial Product Price Index (IPPI) reflects the prices that producers in Canada receive as goods leave their plants. It does not reflect what consumers pay. Unlike the Consumer Price Index (CPI), the IPPI excludes indirect taxes and all costs (including transportation, wholesale and retail costs) occurring between when a good leaves a plant and when a final user takes possession.

Canadian producers export many goods. They often quote their prices—particularly for motor vehicles, pulp, paper, and wood products—in foreign currencies. Accordingly, a 1.0% change in the value of the Canadian dollar against the U.S. dollar changes the IPPI by an estimated 0.3%.

Meat producers saw pork prices recover from March's 11.6% drop and gain 6.6% in April. In April, hog prices recovered 13.3% from March's 9.5% price decline. For their part, consumers saw store prices for pork edge down marginally in April. Meat producers also saw an increase in beef product prices in April (+2.2%), as they prepared for the summer barbecue season.

(continued on page 3)

... Industrial product prices unchanged

Motor vehicle prices in April fell 2.3%. Export prices were down for both autos (-2.4%) and trucks (-2.5%). Domestic prices, by contrast, edged down 0.2% for cars and 0.9% for trucks, a consequence of manufacturers readjusting their incentive programs.

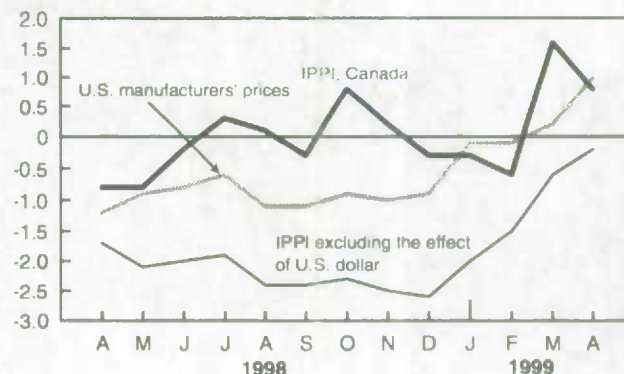
Paper and allied product prices were down 1.4% overall. Within the category, newsprint prices fell 7.0%. Domestic prices were down 5.9%, while export prices dropped 7.1%. In the United States, newsprint prices declined 2.1%. Across North America, production continues to exceed what is needed to bring about a price recovery for newsprint. As for pulp, the overall price level was up. Primarily, this occurred because of a sharp price rise for mechanical wood pulp, which was due to lower than expected inventories held by producers in North America and Scandinavia.

Available on CANSIM: matrices 1870-1878.

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Industrial Product Price Index

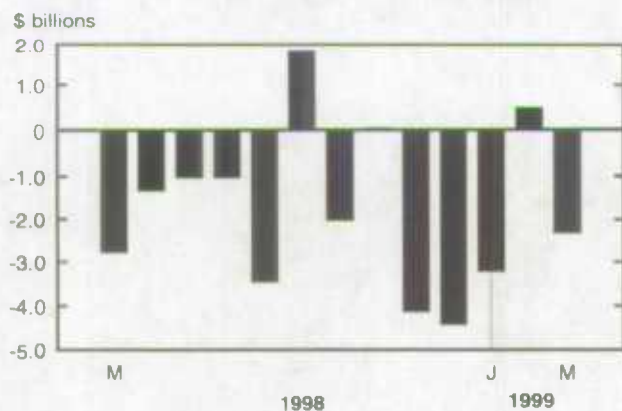
% change, 12 months



Canadian investors focus again on U.S. markets

In March, Canadian investors continued to accumulate foreign securities, adding \$2.3 billion to their holdings. As for foreign stocks, Canadians purchased a significant \$1.9 billion worth—three-quarters of which were U.S. equities. Underlying this investment were strong U.S. stock prices. Canadians were also net buyers in March of a modest amount of foreign bonds (\$0.4 billion). Over the seven months starting in September 1998, Canadian investors accumulated \$8.2 billion worth of foreign bonds—three-quarters of which were U.S. treasury bonds.

Canadian investment in foreign stocks and bonds



Note: Bars below the zero line indicate investment outside Canada.

Note to readers

In March, the interest-rate differential on short-term government instruments, which favours investment in Canada, held at about 30 basis points for a third consecutive month. The differential on long-term government instruments again favoured investment in the United States (by 25 basis points); for the six months prior to February, it favoured investment in Canada.

After a one-month decline of 6.2% in February, Canadian stock prices (TSE 300 composite index) resumed their upward climb in March with a 4.5% increase. A 3.9% gain in U.S. stock prices (Standard & Poor's 500 index) in March erased the 3.2% lost in February.

The Canadian dollar closed March at 66.28 U.S. cents, virtually unchanged from February.

Foreigners cut their holdings in March of Canadian securities by a further \$1.3 billion. They continued to be net sellers of Canadian stocks, reducing their holdings in March by \$0.8 billion. Excluding portfolio investment through new treasury shares (related to direct investment acquisitions), foreign investors actually divested themselves of \$9.2 billion worth of Canadian stocks since June 1998—U.S. investors accounted for almost two-thirds of these sales. European investors accounted for the rest. Although they were up in March, Canadian stock prices have not performed as well as their U.S. counterparts.

Foreign holdings of Canadian money market instruments declined in March by a modest \$0.4 billion, partly offsetting the increase in February. In the first three months of 1999, foreign investors cut their holdings of Canadian short-term paper (government and corporate) by \$4 billion. This occurred even

(continued on page 4)

... Canadian investors focus again on U.S. markets

though the differential on short-term instruments continued to favour investment in Canada. The exception in March was Canadian Treasury bills: foreign holdings were largely unchanged. As for Canadian bonds, foreign investment was negligible in March. Canadian bonds issued in foreign markets (\$3.5 billion) were exceeded by retirements of foreign-held issues (\$4.2 billion); however, this difference was largely offset by foreign purchases of Canadian bonds on the secondary market.

Weekly earnings virtually unchanged

At \$605.47, employees' average weekly earnings in March were virtually unchanged from February and stood at about the same level as in March 1998.

For employees in most industries, there were no gains in average weekly earnings compared with March 1998. The exceptions were for employees in business services (+2.3%) and for those working at real estate and insurance agencies (+3.4%). In business services, the strongest year-over-year growth in earnings was seen in computer and related services and in accounting and bookkeeping services.

Average earnings in Quebec, Ontario and New Brunswick declined from March 1998 by approximately 1%. Two factors contributed most to these declines: lower average weekly hours for hourly rated employees in New Brunswick and Quebec, and lower pay for commissioned staff and other employees in Quebec and Ontario.

In March, hourly rated employees in all industries worked an average of 31.3 hours per week (including overtime), up from 31.0 hours in February. Average hourly earnings paid to hourly rated employees in March were \$15.23, up from a year earlier by 1.4%.

Payroll employment increased in March by 38,000 employees. The largest additions to payrolls were made by employers in business services, wholesale trade and retail trade. The employment gains in wholesale and retail were consistent with the gains in wholesale and retail trade volumes in the first quarter of 1999.

Fewer Canadians receiving employment insurance

Fewer Canadians received the regular benefits from employment insurance (EI) in March. Their number declined 0.7% from February to 524,820. In Ontario, a 4.5% drop in the number of beneficiaries was in line with other economic indicators as reported by the Labour Force Survey and

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

The March 1999 issue of Canada's international transactions in securities (67-002-XPB, \$18/\$176) presents the full report. For further information, contact Barry Mersereau (613-951-9052), Balance of Payments and Financial Flows Division.

Average weekly earnings, all industries, March 1999 Seasonally adjusted

	\$	% change, previous month	% change, previous year
Canada	605.47	0.0	-0.3
Newfoundland	535.21	0.3	2.7
Prince Edward Island	486.06	0.5	0.2
Nova Scotia	515.35	0.9	1.6
New Brunswick	516.88	-0.5	-1.1
Quebec	565.68	-0.2	-1.1
Ontario	644.95	0.0	-0.7
Manitoba	540.16	-0.8	1.2
Saskatchewan	538.37	-0.2	0.8
Alberta	621.08	0.3	1.1
British Columbia	624.17	0.1	1.2
Yukon	681.11	0.3	-1.1
Northwest Territories	714.00	0.6	-0.9

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

The March 1999 issue of Employment, earnings and hours (72-002-XPB, \$32/\$320) presents the month's industry data and other labour market indicators in detail. Custom tabulations of the data are available on request. For further information, contact Jean Leduc (613-951-4090; fax: 613-951-4087; labour@statcan.ca), Labour Division.

the Survey of Employment, Payrolls and Hours. The number of individuals being paid the regular EI benefits increased in New Brunswick, Newfoundland, Alberta and British Columbia. In the other provinces, the number of beneficiaries remained relatively unchanged.

The amount paid out in March as regular benefits decreased 2.1% to \$666.2 million. The number of EI claims received from the jobless was down from February by 2.0% to 227,400.

(continued on page 5)

... Fewer Canadians receiving employment insurance

The number of beneficiaries is a measure of all persons who received employment insurance benefits for the week containing the 15th day of the month. Regular benefit payments is the total of all monies received by individuals for the entire month. These different reference periods must be considered when making data comparisons.

The Employment Insurance Act allows each province or administrative region of Human Resources Development Canada some autonomy in the way renewal claims are handled. Thus, changes from month to month in claims levels may be affected by these differences in provincial/regional administrative procedures. The seasonally adjusted regular beneficiaries data series (1975 to 1998) has been revised to reflect the final 1998 data.

Available on CANSIM: matrices 26 (series 1.6), 5700-5717 and 5735-5736.

For more information, contact Gilles Groleau (613-951-4090; fax: 613-951-4087; labour@statcan.ca), Labour Division.

EI beneficiaries receiving regular benefits, March 1999

Seasonally adjusted

	Beneficiaries	% change, previous month	% change, previous year
Canada	524,820	-0.7	-4.3
Newfoundland	35,370	3.6	6.2
Prince Edward Island	8,440	-0.8	-6.8
Nova Scotia	28,290	0.7	-2.5
New Brunswick	35,130	3.9	-6.0
Quebec	179,060	0.4	-7.4
Ontario	104,500	-4.5	-16.8
Manitoba	13,590	-0.2	5.1
Saskatchewan	12,910	1.0	33.9
Alberta	39,130	2.6	43.0
British Columbia	67,100	1.2	-1.0
Yukon	1,170	0.4	-9.9
Northwest Territories	1,220	0.0	13.2

Farm cash receipts down slightly in first quarter

In the first quarter, farm cash receipts totalled \$7.8 billion, down 0.4% from the same quarter a year earlier. Even so, receipts remained 4.0% above the first-quarter average of the past five years. The largest decreases were in Saskatchewan (-6.6%), Ontario (-1.8%) and Alberta (-1.5%). (Farm cash receipts measure the gross revenue of farm businesses in current dollars.) Program payments fell 0.8% in the quarter to \$261 million.

Crop receipts slipped 2.2% to \$4.0 billion. Except for corn, receipts for all major grains and oilseeds declined. Corn receipts were up despite lower prices, as a record harvest last fall boosted domestic deliveries in the first quarter by 78.6%. Receipts for potatoes, which were among the crops that did well in the first quarter, continued to climb (+12.8%), fuelled by growing demand for processed potato products in both Canada and the United States. The first quarter's most notable decrease in crop receipts was for canola (-20.2%). This decline can be attributed to lower prices and marketings, as well as to higher deliveries at the beginning of the crop year.

Livestock receipts rose compared with the first quarter of 1998 by 1.8% to \$3.6 billion. A large part of the increase was due to cattle and calf receipts (+4.5%), which resulted from higher prices and less slaughter. Dairy receipts were up 4.9%. More milk and cream was sold as production and prices rose. Hog receipts fell 5.4% from the first quarter of 1998. Slaughter hog prices rebounded 31.6% from the dismal last quarter of 1998.

Farmers recorded a sharp decline in their net cash income in 1998, largely because of plummeting hog prices and sagging grain markets. Net cash income fell 9.1% from 1997 to 1998, down to \$6.2 billion. This level was still slightly higher than the five-year average of \$6.1 billion for the period from 1993 to 1997. (Net cash income reflects the cash flow of farm businesses and is the difference between farm cash receipts and operating expenses.)

In 1998, farm cash receipts declined 1.7% to \$29.3 billion—the first year since 1990 that receipts fell. However, receipts last year were still above the five-year average (1993-97) of \$27.3 billion. Direct program payments climbed 29.9% to \$1.4 billion to help offset the decline in receipts in 1998. The Prairie provinces were hardest hit by the low hog and grain prices. Prince Edward Island and New Brunswick recorded increases in net cash income supported by both higher marketings and higher prices for potatoes.

Operating expenses rose a marginal 0.5% in 1998 to a record \$23.2 billion. Although the increase in expenses was the smallest since 1990, there were some significant changes in specific items. Interest costs surged 11.2% to \$2.0 billion, the result of a 9.0% jump in the farm debt load. Livestock and poultry purchases climbed 25.1% to \$0.9 billion, mostly in Western Canada. The end of the Western Grain Transportation Act resulted in an expansion of the livestock sector in Western Canada and, more particularly, growth in Alberta's slaughter market. Expenses declined for machinery fuel and lubricants (-10.0%), prepared feed (-13.6%) and fertiliser (-5.3%).

A weaker Asian market and expanding hog inventories in North America pushed down hog receipts in 1998, while improved efficiency and competitiveness in large-scale enterprises continued to boost production. This outstripped slaughter capacity and drove prices down to their lowest levels in 25 years.

Expanding global stocks of wheat, barley and corn led to downward pressure on prices. Lower marketings also contributed as farmers planted less wheat. By contrast, canola receipts broke records for receipts, as record production and increased crushing capacity boosted deliveries to all-time highs. Lower grain prices have encouraged diversification into oilseeds and other specialty crops.

Cattle receipts reached a record in 1998 because of higher prices, heavier slaughter weights and increased marketings. Dairy receipts also rose as producers increased production to sell more milk and cream at higher prices. Potato receipts posted a gain last

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... Farm cash receipts down slightly in first quarter

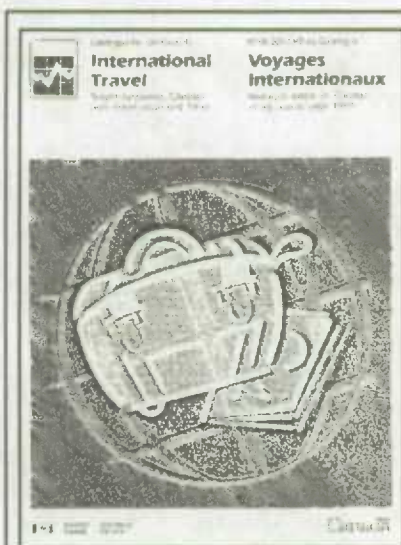
year, as greater demand for processed potato products in North America pushed production to record levels.

Total net farm income (adjusts net cash income for the value of inventory change, depreciation and income-in-kind) advanced 16.0% in 1998 to \$2.9 billion. Despite the growth, total net farm income last year was 18.0% below the five-year (1993-97) average of \$3.5 billion.

Available on CANSIM: matrices 171-172, 208-215, 225, 244, 249-259, 263-272, 3571-3603, 5631 and 5678.

*The Agriculture economic statistics supplement (21-603-UPE, Issue 99-001, \$26/\$52) will be released in July. The January-March 1999 issue of **Farm cash receipts** (21-001-XIB, \$15/\$48) will be available shortly. For further information on net farm income, contact Gail-Ann Breese (204-983-3445; bregai@statcan.ca) or Bernie Rosien (613-951-2441; rosiber@statcan.ca), Agriculture Division. For more information on farm cash receipts, contact Martin Beaulieu (613-951-6357; beaulma@statcan.ca), Agriculture Division.*

New from Statistics Canada



International travel 1997

The 1997 issue of *International travel—travel between Canada and other countries* presents a profile of travellers to and from Canada. For example, you will find information on the growth of American air travel to Canada, the top American states visited by Canadians, as well as the most popular activities enjoyed by overseas visitors.

*The 1997 issue of **International travel—travel between Canada and other countries** (paper: 66-201-XPB, \$42; Internet: 66-201-XIB, \$32) is now available. For further information, contact Carol Moskaluk (613-951-9169; fax: 613-951-2909; moskcar@statcan.ca), Tourism Statistics Program.*

Earnings of men and women 1997

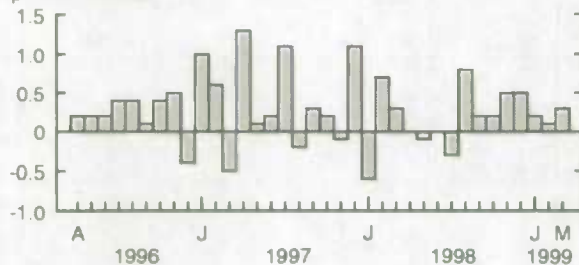
Another report from the Survey of Consumer Finances is now available. *Earnings of men and women, 1997* presents the latest data on average and median annual earnings of women and men by work activity ("full-year full-time" and "other"). As well, it covers the distribution of earners by earnings groups and various characteristics. The report also contains historical data on averages, estimated numbers and female-to-male earnings ratios by work activity and selected characteristics for the period from 1980 to 1997. The historical data on average annual earnings and number of earners by sex are available at no charge from Statistics Canada's Web site (www.statcan.ca). Look under "Canadian statistics", then "The people—labour, employment and unemployment" followed by "Earnings".

*The publication **Earnings of men and women, 1997** (13-217-XIB, \$21) is now available. For further information about the survey results and the related products and services, contact Client Services (613-951-7355 or 1 888 297-7355; fax: 613-951-3012; income@statcan.ca), Income Statistics Division.*

Current trends

Gross domestic product

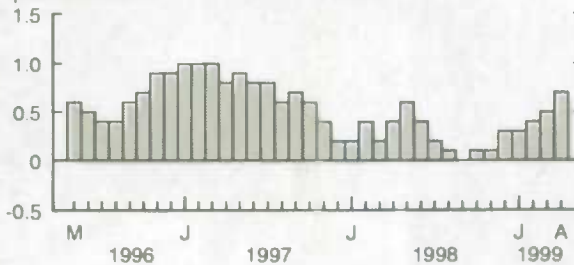
% change,
previous month



Economic activity continued to advance in March (+0.3%), extending the steady expansion that began in mid-1998.

Composite Index

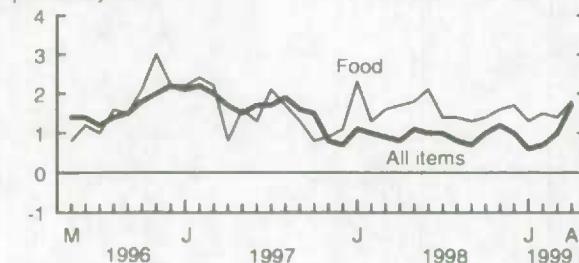
% change,
previous month



The growth of the leading indicator continued to improve, with a gain of 0.7% in April.

Consumer Price Index

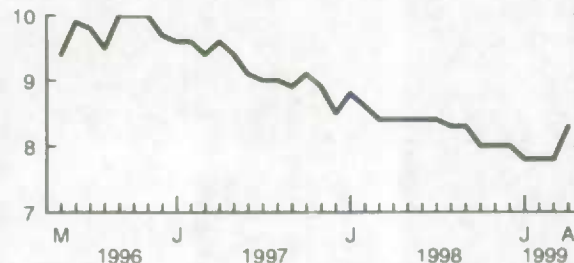
% change,
previous year



Consumers paid 1.7% more for goods and services in April 1999 than they did a year earlier. Food prices rose 1.8%.

Unemployment rate

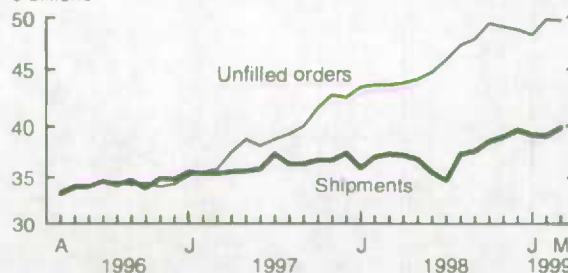
%



In April, a sharp jump in the number of people looking for work pushed the unemployment rate to 8.3%.

Manufacturing

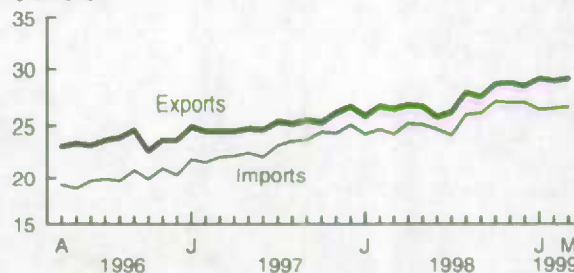
\$ billions



Manufacturers' shipments increased 2.0% in March to \$39.8 billion. The backlog of unfilled orders slipped 0.3% to \$49.7 billion.

Merchandise trade

\$ billions



In March, the value of merchandise exports edged up 0.6% from February to just under \$29.0 billion. Imports were almost unchanged (+0.2%) at \$26.4 billion.

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

Latest statistics

	Period	Level	Change, previous period	Change, previous year
GENERAL				
Gross domestic product (\$ billion, 1992)	March*	733.1	0.3%	2.4%
Composite Index (1981=100)	April	212.9	0.7%	4.1%
Operating profits of enterprises (\$ billion)	Q4 1998	28.7	15.1%	- 1.0%
Capacity utilization (%)	Q4 1998	82.5	0.7†	- 0.9†
DOMESTIC DEMAND				
Retail trade (\$ billion)	March	21.3	1.1%	4.9%
New motor vehicle sales (thousand of units)	March	125.2	6.3%	5.3%
Wholesale trade (\$ billion)	March	29.3	0.8%	5.2%
LABOUR				
Employment (millions)	April	14.65	0.1%	2.6%
Unemployment rate (%)	April	8.3	0.5†	- 0.1†
Participation rate (%)	April	66.0	0.4†	0.9†
Labour income (\$ billion)	January	39.3	- 0.2%	2.6%
Average weekly earnings (\$)	March*	605.47	0.0%	- 0.3%
Help-wanted Index (1996=100)	May*	157	0.9%	10.0%
INTERNATIONAL TRADE				
Merchandise exports (\$ billion)	March	29.0	0.6%	10.3%
Merchandise imports (\$ billion)	March	26.4	0.2%	8.9%
Merchandise trade balance (all figures in \$ billion)	March	2.6	0.1	0.6
MANUFACTURING				
Shipments (\$ billion)	March	39.8	2.0%	6.4%
New orders (\$ billion)	March	39.7	- 2.3%	5.9%
Unfilled orders (\$ billion)	March	49.7	- 0.3%	14.2%
Inventory/shipments ratio	March	1.25	- 0.02	- 0.04
PRICES				
Consumer Price Index (1992=100)	April	110.1	0.5%	1.7%
Industrial Product Price Index (1992=100)	April*	119.9	0.0%	0.8%
Raw Materials Price Index (1992=100)	April*	112.1	4.9%	0.4%
New Housing Price Index (1992=100)	March	100.5	0.2%	0.6%

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

* new this week

† percentage point

Infomat

A weekly review

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