



# Infomat

## A Weekly Review

Friday, February 4, 2000

### OVERVIEW

#### ◆ Raw material prices record first annual increase in three years

In December, surging oil prices pushed up the yearly increase in raw material prices to its highest level ever (+33.9%). After two straight annual declines, raw material prices in 1999 climbed an average 7.9%. Again, crude oil played the major role.

#### ◆ Industrial prices climb as fuel prices rise

The 12-month increase in industrial prices hit a four-year high in December (+3.9%). For 1999 as a whole, manufacturers received an average 1.8% more for their products than in 1998, primarily due to rising fuel prices.

#### ◆ Retail sales partly recover

Fuelled by the auto sector, retail sales in November recovered about half the loss sustained in October, advancing 0.6%. However, excluding vehicle dealers, total retail sales declined in November by 0.5%.

#### ◆ Wholesalers continue growing sales

In November, wholesale sales rose 1.3%. The advance was spurred by lumber and building materials wholesalers and by wholesalers of industrial and other machinery, equipment and supplies.

#### ◆ Average weekly earnings up slightly

In November, employees earned an average \$616.04 per week, up from October by 0.4% for an annual increase of 1.5%. The annual increase in average earnings was moderate in most industries.

#### ◆ Financial-market components drive composite index higher

In December, the growth of the leading indicator rose to 0.5%. Most of the advance originated in the indicator's financial-market components.

### Raw material prices record first annual increase in three years

Surging oil prices pushed up December's year-over-year increase in raw material prices to their highest level on record. Manufacturers paid 33.9% more for raw materials in December 1999 than they did in December 1998—the strongest rate of increase since the Raw Materials Price Index (RMPI) began in 1981. Crude oil prices, which have been rising since March 1999, vaulted 142.9% between December 1998 and December 1999. Excluding the mineral fuels category (almost all of which is crude oil), raw material prices increased just 6.8% over those 12 months.

On a month-to-month basis, the index gained 3.6% in December compared with November. Crude oil prices increased 7.3% during the month. Higher prices for aluminum materials, hogs, copper, nickel, cattle, coffee, logs and raw tobacco were somewhat offset by lower prices for grains, oilseeds, unrefined sugar, pulpwood and gold.

For 1999 as a whole, manufacturers paid an average 7.9% more for their raw materials than they did in 1998. This followed two straight years of declines in the RMPI, which fell on average 14.5% in 1998 and 1.6% in 1997. Again, crude oil played a major role throughout the year, climbing an average 36.5%. Excluding mineral fuels from the index, raw material prices in 1999 decreased an average of 1.1% from 1998.

#### Annual change in raw material prices

	1997	1998	1999
		%	
Raw materials price index (RMPI)	-1.6	-14.5	7.9
Mineral fuels	-3.9	-25.3	33.8
RMPI excluding mineral fuels	-0.7	-10.0	-1.1
Vegetable products	-5.3	-10.2	-12.7
Animals and animal products	1.7	-6.9	2.2
Wood	-0.9	-14.6	3.5
Ferrous materials	0.1	-1.3	-10.7
Non-ferrous metals	-1.4	-13.4	-1.2
Non-metallic minerals	3.1	3.5	2.3

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l'INTRANET (réplique) de StatCan

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### ... Raw material prices record first annual increase in three years

Hog prices, which had reached very low levels at the end of 1998, also recovered last year, increasing by more than 2.5 times between December 1998 and December 1999. As a result, hog prices were 0.8% higher on average in 1999 than they were in 1998.

Wood prices rose an average 3.4% in 1999—the first annual price increase since 1995. An average 5.3% increase in log prices was offset somewhat by lower pulpwood prices (-2.7%). Stronger housing starts in Canada and in the United States and growing log exports to Japan were mainly responsible for the increase in log prices.

Grains and oilseeds declined an average 12.7% last year. Prices fell for grains (-9.0%), oilseeds (-22.1%), unrefined sugar (-23.8%) and coffee (-21.7%). The only offsetting factor was a 13.7% increase in the price of fresh potatoes. Grain and oilseed prices have taken a beating the past few years. It is difficult to foresee any short-term relief for these commodities: inventories are high, farmers have record-breaking crops, and the export market is fiercely competitive. Unrefined sugar was subject last year to huge inventories, record crops and market restraints from Russia (the world's largest sugar importer). As a result, prices were near seven-year lows. Coffee prices plunged during the first nine months of 1999, and then roared back during the fourth quarter due to poor weather in Brazil.

Non-ferrous metal prices declined last year an average 1.2%. More specifically, copper prices fell on average by 3.3%, mainly due to significantly higher worldwide inventories and lacklustre demand. Gold prices fell 5.0%, as the world's banks decided that

#### Note to readers

The Raw Materials Price Index (RMPI) reflects the prices that manufacturers paid for key raw materials. Many of these prices are set in a world market. Also, unlike the Industrial Product Price Index, the RMPI includes goods that are not produced in Canada.

Annual indexes are obtained by averaging the indexes for the 12 months of the calendar year. The percentage changes calculated from such averages are referred to as annual changes.

gold no longer held the same store of value as other potential investments. As well, the International Monetary Fund also decided to reduce its gold holdings. However, metals, associated with the steel and stainless steel industry saw higher annual prices in 1999. Zinc prices increased an average 2.4%, while nickel shot up 30.4%. As well, prices of aluminum materials (used more and more in the motor vehicle industry) increased an average 2.6%.

Ferrous materials, by contrast, declined in price last year by an average 10.7%. Prices for iron ore concentrates fell an average 7.9%, while those for iron and steel scrap dropped 12.8%. Recent reports of higher steel prices in 2000 could provide upward pressure to prices of iron and steel scrap and iron ore concentrates.

Available on CANSIM: matrix 1879.

The December 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](mailto:infounit@statcan.ca)). Prices Division.

## Industrial prices climb as fuel prices rise

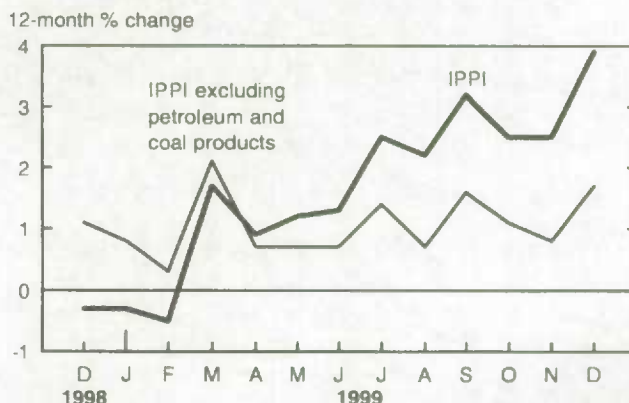
The 12-month increase in the Industrial Product Price Index (IPPI) hit a four-year high in December (+3.9%) on the heels of strong price increases for petroleum and non-ferrous primary metals.

A higher Canadian dollar in December actually tempered the year-over-year increase in the IPPI. If the exchange rate had remained the same as it was in December 1998, the IPPI would have risen a more substantial 5.0%. (A 1.0% change in the Canada-U.S. exchange rate changes the IPPI by an estimated 0.3%.)

Petroleum and non-ferrous primary metals showed marked price gains on a 12-month basis, pushing up the total IPPI. These gains were dampened by the stronger Canadian dollar and by lower prices for motor vehicles.

For 1999 as a whole, manufacturers received an average 1.8% more for their products than in 1998. This was the largest average annual increase in industrial prices since 1995, when they rose an average 7.4%. The increase in 1999 was driven by rising fuel prices and, to a lesser extent, by higher prices for lumber and motor vehicles. (Annual indexes are obtained by averaging the

### Industrial product price index



indexes for each month of the calendar year. The percentage changes calculated from such averages are referred to as annual changes.)

(continued on page 3)



### ... Industrial prices climb as fuel prices rise

Refined petroleum prices were on the rebound throughout most of last year, climbing an average 14.9% from 1998. The increase reflected a 36.5% jump in crude oil prices. (OPEC committed to significant production cuts in March 1999.) The upward trend of petroleum product prices has had a substantial impact on the overall IPPI. If petroleum and coal products were excluded from the index, the 1999 annual average increase in the IPPI would have been a more modest 1.1%.

After a slump during part of 1997 and much of 1998, lumber prices were on an upswing through most of 1999. On the heels of an 11.3% drop in 1998, annual lumber prices advanced an average 12.3% in 1999. The lumber industry was operating at an average 90% of capacity in the first three quarters of 1999, compared with 83% for the first three quarters of 1998. The turnaround was concentrated in softwood lumber (+12.9%). A strong North American housing market fostered much of these gains. In contrast, hardwood prices fell last year by 2.7%. In both cases, export prices were stronger than domestic prices.

Motor vehicle prices rose last year an average 1.7%, as consumer confidence translated into robust North American sales. American consumers bought a record number of cars, while Canadian sales approached levels last seen in the late 1980s. Annually, truck prices gained 2.9%, bolstered by the popular sport-utility vehicles. The annual rise in car prices was more modest (+0.8%). In both cases, domestic prices were outpaced by export market prices. This coincided with a growing volume of automotive exports. Annual motor vehicle prices climbed throughout the 1990s, leaving 1999 prices 55.6% higher than a decade earlier. Over the same period, the U.S. dollar gained 25.4% vis-à-vis the Canadian dollar, pushing up prices for most vehicles.

### Industrial prices up slightly in December

After two months of virtually no change, industrial product prices rose from November to December by 0.6%. If the Canada-U.S. exchange rate had remained unchanged, the IPPI would have increased by half as much (+0.3%). The major contributors to the increase were motor vehicles (+1.1%), refined petroleum products (+2.3%) and meat products (+3.1%). Vehicle prices were boosted by a stronger U.S. dollar. Refined petroleum products' upward price trend continued, leaving prices 49.9% above December 1998 levels. Crude oil inventories dwindled as OPEC production cuts continued, even in the face of rising prices. Meat products' price advance was primarily due to a 10.7% climb in pork prices. Overall, meat product prices ended the year 10.2% higher than in December 1998.

Primary metal product prices edged up 0.3%. Primary copper product prices ran up 4.4% on strong industrial production in the United States and on improved demand from Europe and the Far East. Nickel product prices kept rising (+1.2%) in December to stand 99.3% above their recent low in December 1998. A recently resolved labour dispute in Manitoba had tightened supplies at a time of accelerating demand.

Available on CANSIM: matrices 1870-1878.

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

### Retail sales partly recover

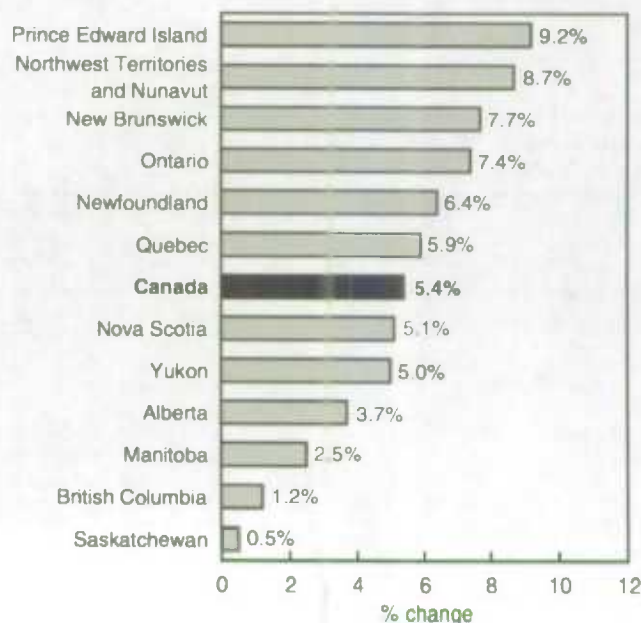
Fuelled by the auto sector, retail sales in November recovered about half the loss sustained in October, advancing 0.6% to \$22.0 billion. However, excluding motor and recreational vehicle dealers, total retail sales declined in November by 0.5%.

The automotive trade group, after a 4.7% decline in October, bounced back in November (+3.1%). Motor and recreational vehicle dealers, the largest component of this sector, increased sales by 3.9%. Their sales dropped 7.0% in October. Consumer confidence, sales incentives and the availability of popular models are among the factors that affect monthly sales in this industry. Overall, automotive retailers have enjoyed strong sales growth since the fall of 1998.

Department stores posted a near-record drop in sales in November (-8.2%), and were almost entirely responsible for the sales decline in the general merchandise trade group (-4.9%). It marked the largest monthly decline in department store sales since April 1994 (-8.3%). These record declines can both be associated with the closure of department store chains: most of Eaton's stores were closed in November 1999, while Woolco stores were sold to Wal-Mart in early 1994.

In November, consumers also reduced spending at furniture stores (-2.6%) and at clothing stores (-1.1%). These declines

Cumulative retail sales,  
Jan.-Nov. 1999 compared to Jan.-Nov. 1998



(continued on page 4)

### ... Retail sales partly recover

followed significant sales gains in October for both store types. Sales at both furniture and clothing stores have been generally growing since early 1996.

Drugstores posted the second largest sales growth in percentage terms in November (+1.4%). Drugstore sales have been slowly rising since last spring. Higher sales were also seen at food stores in November (+0.5%). Sales at food stores have been on the rise since the spring of 1996.

At the provincial level, retailers in Atlantic Canada and in Central Canada posted good year-to-date results, while sales advanced in November in all provinces except British Columbia and Nova Scotia. After reporting significant declines in October, retailers in Saskatchewan and Manitoba posted the largest sales increases in November. Retail sales in these two provinces have shown little progress in the last two years.

**Available on CANSIM: 2399 and 2400 (main matrices), 2299, 2397, 2398, 2401-2416 and 2418-2420.**

The November 1999 issue of *Retail trade* (paper: 63-005-XPB, \$21/\$206; online at [www.statcan.ca](http://www.statcan.ca): 63-005-XIB, \$16/\$155) presents the full report. To order data, or for general information, contact Client Services (1 877 421-3067 or 613-951-3549).

**Retail sales, November 1999**  
Seasonally adjusted

	\$ millions	% change, previous month	% change, previous year
<b>Canada</b>	<b>22,008</b>	<b>0.6</b>	<b>6.1</b>
Newfoundland	352	1.6	5.5
Prince Edward Island	99	0.7	14.5
Nova Scotia	681	0.0	5.4
New Brunswick	546	0.6	10.1
Quebec	5,075	0.8	5.0
Ontario	8,475	0.6	8.2
Manitoba	751	2.1	2.2
Saskatchewan	649	3.2	3.5
Alberta	2,496	0.3	6.3
British Columbia	2,807	-0.2	3.0
Yukon	27	3.0	4.5
Northwest Territories	34	-0.8	..
Nunavut	15	1.9	..

.. Figures not available.

[retailinfo@statcan.ca](mailto:retailinfo@statcan.ca)). For further analytical information, contact Paul Gratton (613-951-3541, [gratpau@statcan.ca](mailto:gratpau@statcan.ca)), Distributive Trades Division.

## Wholesalers continue growing sales

Wholesale sales rose 1.3% in November to \$31.4 billion. The advance was spurred by lumber and building materials wholesalers (+5.2%) and by wholesalers of industrial and other machinery, equipment and supplies (+3.8%). Notable sales increases (in percentage terms) were reported by wholesalers of apparel and dry goods (+14.2%) and by household goods wholesalers (+4.6%). However, their combined results accounted for less than 5% of overall sales.

November's strong 5.2% sales growth in the lumber and building materials trade group followed 1.1% sales growth in October. These two advances followed a third quarter where

sales declined in each of the three months. November's advance seemed to be heavily based on domestic construction activity, since unseasonably warm weather extended the construction season. Lumber wholesalers also benefited from the first increase in four months in lumber prices (+0.8%).

The 3.8% sales gain for industrial and other machinery, equipment and supplies was propelled by industrial equipment and electrical supplies. Foreign demand may have contributed to the increased sales of industrial equipment: exports of industrial machinery climbed 8.9% in November. Sales of electrical supplies benefited from increased building activity in Canada, as well as by increased spending in the United States on private non-residential construction (+3.0%).

Among the groups that posted sales declines, wholesalers of farm machinery, equipment and supplies recorded a drop of 8.0%. This came on the heels of very strong increases in September and October. This group also sells equipment related to snow clearing activities. They reported that the unusually warm weather and resulting lack of snow was a factor in the reduced sales. Despite recent signs of improved sales, these wholesalers have reported generally diminishing sales for a year now, and they were the only group to show a year-over-year sales decrease in November (-6.0%).

Noteworthy sales declines were also reported by wholesalers of beverage, drug and tobacco products (-2.5%) and wholesalers of computers, packaged software and other electronic machinery (-2.2%). Despite the sales decline in the latter group, inventories were down 0.8%. Although their sales weakened during the second half of 1999, they remained almost 10% higher than in November 1998.

Nova Scotia and Saskatchewan were the only provinces where wholesale sales declined in November. In Nova Scotia, the decline

**Wholesale sales, November 1999**  
Seasonally adjusted

	\$ millions	% change, previous month	% change, previous year
<b>Canada</b>	<b>31,353</b>	<b>1.3</b>	<b>11.3</b>
Newfoundland	219	4.6	12.4
Prince Edward Island	53	0.6	4.0
Nova Scotia	546	-2.9	4.5
New Brunswick	387	1.3	15.8
Quebec	6,394	0.6	10.6
Ontario	15,721	1.8	13.7
Manitoba	930	2.1	2.8
Saskatchewan	919	-1.0	11.1
Alberta	2,778	1.0	7.6
British Columbia	3,384	1.6	8.2
Yukon	9	-10.6	-13.3
Northwest Territories	11	-9.2	..
Nunavut	2	-9.0	..

.. Figures not available.

(continued on page 5)



### ... Wholesalers continue growing sales

was largely due to lower sales in the industrial and other machinery, equipment and supplies group, despite an overall increase for these wholesalers at the Canada level. Wholesale sales in Nova Scotia have turned downward since the spring of 1999. The sales dip in Saskatchewan was mainly due to wholesalers of farm machinery, equipment and supplies. Wholesale sales in Saskatchewan have been on the rise since late 1998, however. In Newfoundland, wholesalers reported the largest month-to-month sales increase, which followed large decreases in September and October. Sales by Newfoundland wholesalers have generally levelled off since mid-1999.

Inventories held by wholesalers rose 0.6% in November to \$41.9 billion. The rise occurred mostly among the groups with

the highest inventory levels: wholesalers of motor vehicles, parts and accessories (+1.7%) and wholesalers of industrial and other machinery, equipment and supplies (+1.1%). The inventories-to-sales ratio dropped from 1.35 in October to 1.34. Even when inventories are increasing, the inventories-to-sales ratio drops if the increase in sales is larger. The ratio has fluctuated around 1.35 for six months.

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

The November 1999 issue of *Wholesale trade* (63-008-XIB, \$14/\$140) can be downloaded from the Internet at [www.statcan.ca](http://www.statcan.ca). For general enquiries, or to order data, contact Client Services (1 877 421-3067 or 613-951-3549; [wholesaleinfo@statcan.ca](mailto:wholesaleinfo@statcan.ca)). For further analytical information, contact Greg Parsons (613-951-0062; [parsons@statcan.ca](mailto:parsons@statcan.ca)), Distributive Trades Division.

## Average weekly earnings up slightly

In November, average weekly earnings for all employees increased slightly to \$616.04, up from October by \$2.29 (+0.4%). Compared to November 1998, average weekly earnings increased 1.5% (or \$8.81).

**Average weekly earnings by industry, November 1999**  
Seasonally adjusted

	\$	% change, previous month	% change, previous year
<b>All industries</b>	<b>616.04</b>	<b>0.4</b>	<b>1.5</b>
Logging and forestry	797.45	1.6	5.0
Mining, quarrying and oil wells	1,115.44	0.4	0.8
Manufacturing	756.61	0.4	0.2
Construction	708.52	1.1	1.7
Transportation and storage	739.87	0.0	-0.2
Communications and other utilities	814.12	-0.2	2.1
Wholesale trade	662.05	-0.1	-0.5
Retail trade	375.62	0.8	1.3
Finance and insurance	815.14	1.3	1.2
Real estate and insurance agencies	644.85	0.2	0.1
Business services	705.45	0.4	1.9
Education-related services	673.70	0.2	2.2
Health and social services	527.29	0.0	1.2
Accommodation, food and beverage	239.34	1.5	2.4
Public administration	746.34	0.0	2.5
Miscellaneous services	414.47	0.6	2.3

For most industries, the annual gains in average earnings were moderate in November, ranging from 1.0% to 2.5%. The largest annual increase in earnings (+5.0%) went to workers in logging and forestry services, primarily due to more hours worked by hourly-paid employees.

The earnings of hourly-rated employees in all industries averaged \$15.38 per hour in November, an annual increase of 2.3%. Compared with November 1998, the growth in hourly earnings has been strongest in service-producing industries.

For hourly-paid employees, average weekly hours (including overtime) rose 0.2 hours from October, up to 31.4 hours per week in November. Average overtime hours remained unchanged over the same period. Compared with November 1998, average weekly hours did not change. However, total paid hours for hourly employees did increase from a year earlier because of growth in the number of hourly employees.

Payroll employment grew substantially in November, continuing the upward trend that began in mid-1999. Total payroll employment increased in November by 56,000. The gains were strong in manufacturing, construction and business services. Payroll employment levels increased in almost all provinces, with the strongest growth occurring in Ontario, Quebec, Alberta and British Columbia.

**Available on CANSIM: matrices 4285-4466, 4493-4494, 9438-9452, 9639-9664 and 9899-9911.**

The November 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 demand. Annual averages for 1998 are also available in a variety of formats. For further information, contact Jean Leduc (613-951-4090; fax: 613-951-4087; [labour@statcan.ca](mailto:labour@statcan.ca)), Labour Division.

## Financial-market components drive composite index higher

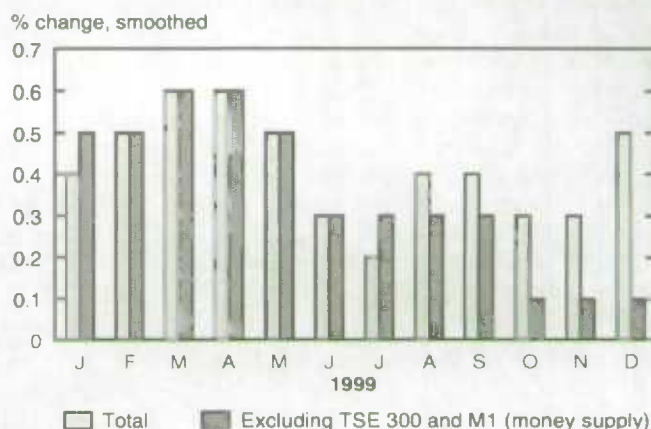
In December, after downward-revised gains of 0.3% in both October and November, the growth of the leading indicator rose to 0.5%. Most of December's advance originated in the indicator's financial-market components.

The stock market ended the year by leaping ahead, led by technology issues. Meanwhile, the money supply accelerated, partly because of the demand for liquidity before clocks turned over to the year 2000. Without these two financial-market components, the overall composite index would have been essentially unchanged since October. Financial markets also led the recent advances in the U.S. leading indicator.

Business demand continued to improve. This was reflected in a gain of 50,000 new jobs in business services during the last six months. New orders for durable goods, notably electronic products, also posted another sharp gain.

Remaining uneven, household demand lost some of its recent force. This was particularly evident in sales of large vehicles after the upturn in gas prices. Housing recorded a third straight drop, which steepened due to slow sales. However, the strength of the labour market at the end of 1999 provided an encouraging indicator for a rise in demand.

Composite index excluding the financial components

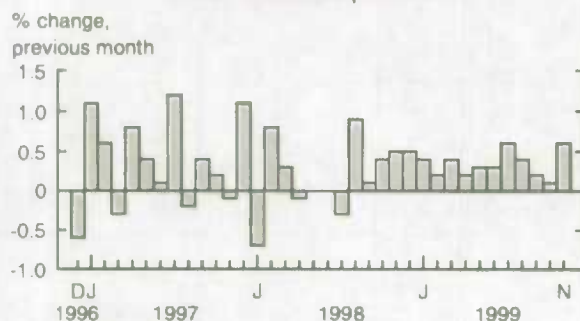


Available on CANSIM: matrix 191.

The January 2000 issue of *Canadian economic observer* (11-010-XPB, \$23/\$227) is now available. For further information, contact Francine Roy (613-951-3627), Current Economic Analysis Group. See also "Current trends" on page 7.

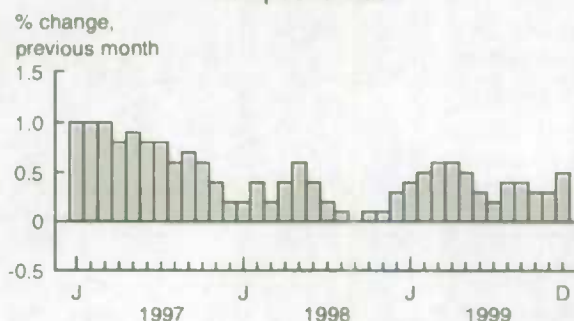
## Current trends

### Gross domestic product



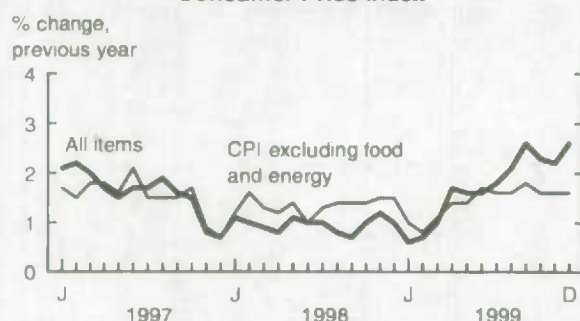
Economic activity advanced 0.6% in November. This extended the expansion to 16 months, continuing the longest uninterrupted series of gains in over a decade.

### Composite Index



In December, the leading indicator grew by 0.5%, led by financial markets.

### Consumer Price Index



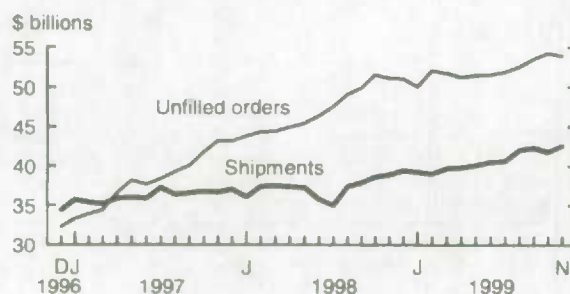
Consumer prices for goods and services were 2.6% higher in December 1999 than they were a year earlier. Excluding food and energy, prices rose 1.6%.

### Unemployment rate



In December, the unemployment rate remained unchanged at 6.9%.

### Manufacturing



Manufacturers' shipments climbed 1.8% in November to \$42.6 billion. The backlog of unfilled orders slipped 0.4% to \$53.9 billion, the first decline since April 1999.

### Merchandise trade



In November, the value of merchandise exports rose 1.4% from October to \$31.4 billion. Imports slipped 0.2% to \$28.2 billion.

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



## Latest statistics

	Period	Level	Change, previous period	Change, previous year
<b>GENERAL</b>				
Gross domestic product (\$ billion, 1992)	November*	760.9	0.6%	4.3%
Composite Index (1981=100)	December*	219.6	0.5%	5.2%
Operating profits of enterprises (\$ billion)	Q3 1999	39.8	7.6%	30.5%
Capacity utilization (%)	Q3 1999	86.0	1.8†	3.6†
<b>DOMESTIC DEMAND</b>				
Retail trade (\$ billion)	November	22.0	0.6%	6.1%
Department store sales (\$ billions)	November	1.44	-7.2%	2.6%
New motor vehicle sales (thousand of units)	November	132.7	3.1%	11.7%
Wholesale trade (\$ billion)	November	31.4	1.3%	11.3%
<b>LABOUR</b>				
Employment (millions)	December	14.92	0.3%	2.4%
Unemployment rate (%)	December	6.9	0.0†	-1.1†
Participation rate (%)	December	65.6	0.1†	0.0†
Average weekly earnings (\$)	November*	616.04	0.4%	1.5%
Help-wanted Index (1996=100)	January*	168	2.4%	13.5%
<b>INTERNATIONAL TRADE</b>				
Merchandise exports (\$ billion)	November	31.4	1.4%	10.5%
Merchandise imports (\$ billion)	November	28.2	-0.2%	6.1%
Merchandise trade balance (all figures in \$ billion)	November	3.1	0.5	1.4
<b>MANUFACTURING</b>				
Shipments (\$ billion)	November	42.6	1.8%	9.3%
New orders (\$ billion)	November	42.3	-0.4%	9.8%
Unfilled orders (\$ billion)	November	53.9	-0.4%	5.5%
Inventory/shipments ratio	November	1.30	-0.01	-0.03
<b>PRICES</b>				
Consumer Price Index (1992=100)	December	111.5	0.1%	2.6%
Industrial Product Price Index (1992=100)	December*	124.1	0.6%	3.9%
Raw Materials Price Index (1992=100)	December*	134.0	3.6%	33.9%
New Housing Price Index (1992=100)	November	101.8	0.3%	1.6%

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

\* new this week

† percentage point

## Infomat

### A weekly review

Published by the Communications Division, Statistics Canada, 10th floor, R.H. Coats Bldg., Ottawa, Ontario, K1A 0T6.

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