TheDaily

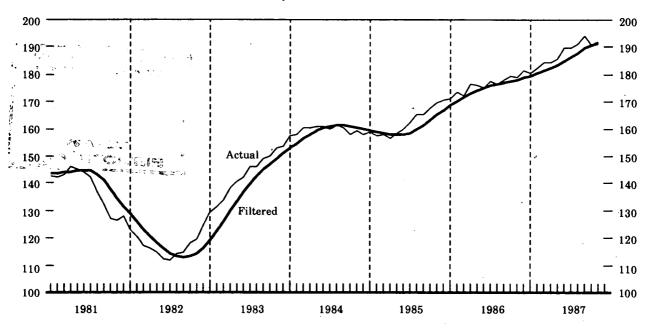
Statistics Canada

Tuesday, February 9, 1988	, FEB	9	1988
Major Releases		BRARY OTHÈG	
 Composite Leading Indicator, November 1987 The composite leading indicator continued to rise in November following increases of 0.6% in October and 0.9% in September. 	r, up 0.4%,		2
New Motor Vehicle Sales, December 1987 and Annu Review Sales of all new motor vehicles totalled 102,246 units, up 1.8% December 1986 level.			4
 Business Conditions Survey, Canadian Manufactures, January 1988 Seasonally adjusted Business Conditions Survey results showed substantial drop in optimism between the October 1987 and January 1988 surveys for orders and expected production. However, the optimism generally remained significantly higher than at the point in 1987. 	ed a inuary e level of		7
Federal Government Business Enterprises, Finance Statistics, 1986 • Federal government business enterprises showed a total net lost taxes, of \$757 million, down 35% from the \$1,167 million loss of the states.	ss, after	1	.0
Data Availability Announcements			_
Industrial Research and Development, 1988		1	.3
Footwear Statistics, December 1987		1	.3
$Shipments\ of\ Solid\ Fuel\ Burning\ Heating\ Products,\ Fourth\ Quarter$	er 1987	1	.3
Sawmills in British Columbia, November 1987		1	.3
Electric Storage Batteries, December 1987		1	.4
Publications Released		1	5

Major Releases

The Canadian Composite Leading Index (1971 = 100)

January 1981 to November 1987



Composite Leading Indicator November 1987

The Canadian composite leading indicator (1971=100) rose by 0.4% in November to a level of 191.5, following increases of 0.6% in October and 0.9% in September. This slowing is mainly the result of a drop in the stock market index. Excluding this component, the overall index grew steadily at 0.9% in both October and November. The unsmoothed version of the index rose 0.3% in November, following a decrease of 1.6% in October.

The manufacturing indicators posted particularly strong growth in November. At the same time, the indicators of personal spending had been growing steadily and capital investment plans of large firms rose for 1988. After

levelling-off in 1986, new orders for durable goods increased 10.4% during the first 11 months of 1987 and 5.1% in November. The United States leading indicator slowed sharply in November, mainly as a result of a second large decrease in stock prices. (The U.S. Commerce Department's calculation of the monthly stock market index spread the mid-October stock market drop over two months, since the monthly measure represents an averaging-out of daily values. In Canada, the mid-October stock market drop impacted fully on the monthly index for October, since the calculation used for the index is the closing value on the last day of the month.)

(continued on page 3)

Following two consecutive strong advances in September (0.5%) and October (0.6%), the monthly measure of real GDP rose 0.1% in November. Goods-producing industries rose 0.7%, largely as a result of increases in manufacturing, mining and construction. A large decrease in the finance industry that resulted from a drop to more normal trading volume on stock exchanges accounted for the lower output of services. Excluding this unusual movement, overall GDP rose by 0.3% in October and 0.5% in November.

Available on CANSIM: matrix 161.

For further information on data published in this issue and the next release dates, or about ordering, contact F. Roy-Mayrand (613-951-3627). For more information on the economy, order the Canadian Economic Observer (11-101, \$20).

Canadian Leading Indicators

	Percentage change			Level	
	Sept.	Oct.	Nov.	Nov.	
Composite Leading Index (1971 = 100)					
Filtered	0.9	0.6	0.4	191.5	
Unfiltered	1.6	.1.6	0.3	191.4	
Retail Trade					
Furniture and appliance sales	1.4	1.1	0.8	146,1824	
New motor vehicle sales	1.1	0.9	1.2	796,4934	
Residential construction index ¹	-1.1	-1.9	-2.4	126.9	
Manufacturing					
New orders - durable	1.1	0.9	1.3	3,6595	
Shipment to inventory ratio -					
(finished goods) ²	0.02	0.02	0.02	1.80	
Average workweek (hours)	-0.0	0.0	0.0	38.8	
Percentage change in price per unit					
labour cost ²	0.03	0.05	0.08	-0.4	
Jnited States composite leading					
index $(1967 = 100)$	0.5	0.4	0.2 .	192.6	
rSE300 stock price index (excluding					
oil and gas)	1.5	.2.2	-4.0	3,542	
Money supply (M1) (\$1971) ³	0.2	0.2	0.0	11,2325	

Composite index of housing starts (units), building permits (constant dollars) and mortgage loan approvals (numbers).

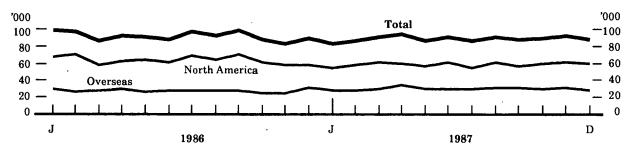
² Difference from previous month.

³ Deflated by the consumer price index for all items.

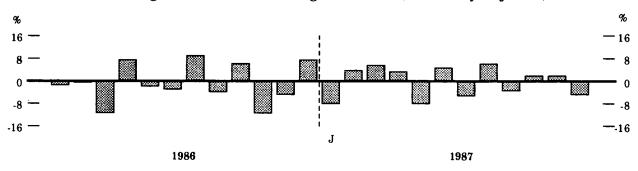
⁴ Thousands of 1971 dollars.

⁵ Millions of 1971 dollars.

Monthly Sales of New Passenger Cars by Origin, Canada, Seasonally Adjusted, in Units, 1986-1987



Month to Month Changes in Total New Passenger Car Sales (Seasonally Adjusted)



New Motor Vehicle Sales December 1987

Highlights

Seasonally Adjusted Sales

 Adjusted for seasonal fluctuations and the number of trading days, preliminary estimates indicate that sales of all new motor vehicles totalled 127,046 units in December 1987, a decrease of 5.3% from the revised November 1987 level of 134,170 units. The December decrease followed gains in October (+4.8%) and November (+1.9%). In December, lower sales were posted for both passenger cars (-4.8%) and commercial vehicles (-6.5%). On an origin basis, sales of North American built passenger cars recorded a decrease of 3.2% in December 1987 to a level of 58,594 units, while imported passenger cars declined by 7.8% to a level of 28,641 units. The drop in December for imported passenger car sales followed an increase of 2.8% in November, whereas North American built passenger car sales decreased after two consecutive monthly increases.

Unadjusted Sales

 Sales of all new motor vehicles totalled 102,246 units in December 1987, up 1.8% over the December 1986 level. In December 1987, commercial vehicle sales advanced by 8.5% to 35,735 units, while passenger car sales fell by 1.5% to 66,511 units.

(continued on page 5)

- The December decrease in total passenger car sales was due to a 10.1% drop for imported passenger cars. Partly offsetting this decline was a 4.0% rise in sales of North American built passenger cars. The year-over-year decrease in imported passenger car sales, which followed 10 consecutive gains, was attributable to a 6.8% decrease in Japanese car sales and to a 16.6% drop in imported cars from other countries.
- Six provinces registered higher unit sales of motor vehicles in December 1987 compared to December 1986, with increases ranging from 10.1% in Newfoundland to 0.7% in Saskatchewan. Decreases were recorded in Prince Edward Island (-13.8%), Nova Scotia (-11.4%), New Brunswick (-9.1%) and Quebec (-0.5%).

Annual 1987

- In 1987, Canadian sales of new motor vehicles reached a level of 1,528,104 units, up 0.8% from the level of 1,515,920 units sold during 1986. This gain was due to a 10.1% increase over 1986 in commercial vehicle sales, which have been increasing strongly since 1983. On the other hand, passenger car sales declined by 2.8%, the second consecutive yearly decrease, following strong growth in the 1983 to 1985 period.
- Of the total passenger cars sold in 1987, vehicles manufactured in North America accounted for 701,048 units, down 7.9% from the previous year, while overseasbuilt passenger cars accounted for 363,817 units, an increase of 8.9% from a year earlier. The increase in imported passenger cars was attributable to a 19.7% increase in Japanese car sales. Partly offsetting this increase was a 7.9% decrease in imported cars from other countries.

- A total of 411,884 North American built commercial vehicles were sold in Canada in 1987, a gain of 11.8% from a year earlier, while sales of imported commercial vehicles decreased 1.6% to 51,355 units.
- North American manufacturers held 65.8% of the Canadian passenger car market in 1987 (based on unit sales), down from the 69.5% share held in 1986. The Japanese market share rose to 22.8% from 18.6% a year earlier. Manufacturers from countries other than North America or Japan held 11.3% of the passenger car market, down from 11.9% in 1986. This decline was attributable to a decrease in the market share held by South Korea, down to 4.8% in 1987 from 6.4% in 1986.
- The retail sales value of all new motor vehicle sales totalled \$24,037 million in current dollars, an increase of 10.0% over 1986. Passenger car sales accounted for \$15,742 million, up 7.3% while commercial vehicle sales contributed \$8,295 million to the total, an increase of 15.7%.

Note to Users:

North American vehicles: motor vehicles manufactured or assembled in North America. These vehicles may be built by domestic or foreign-owned companies.

Imported vehicles: motor vehicles manufactured or assembled overseas and marketed in Canada by domestic or foreign-owned companies.

(see table on page 6)

Available on CANSIM: matrix 64.

Order the December 1987 issue of New Motor Vehicle Sales (63-007, \$9/\$90, available the week of March 14. Contact Roger Laplante (613-951-3549), Retail Trade Section, Industry Division.

New Motor Vehicle Sales (Unadjusted) - Canada December 1987

	December 1987	Change 1987/'86 ⁻	JanDec. 19 8 7	Change 1987/'86 ^r
	Units	%	Units	%
Total New Motor Vehicles	102,246	1.8	1,528,104	0.8
Passenger Cars by Origin:				
North America Japan Other Countries	43,054 16,184	4.0 -6.8	701,048 243,288	-7.9 19.7
(Including South Korea) (South Korea)	7,273 (3,009)	-16.6 (-25.8)	120,529 (50,648)	-7.9 (-27.7)
Total	66,511	-1.5	1,064,865	-2.8
Commercial Vehicles by Origin:				
North America Overseas	31,803 3,932	14.7 -24.8	411,884 51,355	11.8 -1.6
Total	35,735	8.5	463,239	10.1
	Value \$000	%	Value \$000	%
Total New Motor Vehicles	1,717,585	7.5	24,036,522	10.0
Passenger Cars by Origin:				
North America Japan Other Countries	632,405 252,226	14.9 -0.3	10,033,621 3,567,874	1.8 26.9
(Including South Korea) (South Korea)	139,219 (27,565)	-3.3 (-20.3)	2,140,424 (453,150)	7.0 (-2 4 .0)
Total	1,023,850	8.1	15,741,919	7.3
Commercial Vehicles by Origin:				
North America Overseas	630,914 62,821	11.2 -24.5	7,500,911 793,692	16.4 8.7
Total	693,735	6.6	8,294,603	15.7

r Revised figures.

Business Conditions Survey, Canadian Manufacturing Industries

January 1988

Seasonally adjusted results of the Business Conditions Survey showed a substantial drop between the October 1987 and January 1988 surveys in manufacturers' optimism concerning new orders and expected production. However, the level of optimism generally remained significantly higher than at the same point in 1987.

Highlights

(Seasonally adjusted data)

- The largest decline in manufacturers' optimism was for the backlog of unfilled orders. All of the decline resulted from a 28-point drop to 4% in the proportion reporting a "higher than normal" backlog from 32% in the previous survey. This caused an identical drop in the balance of opinion, which is calculated by subtracting the negative "lower than normal" response from the positive "higher than normal" response. But despite the large drop in the balance, the level of -5 in the January 1988 survey was still well above the -14 registered one year ago.
- The balance of opinion concerning the volume of expected production over the next three months was down from a peak of +24 in the October 1987 survey to +12 in the January survey. This balance was still much higher than the +1 recorded at the same time last year. The decline for the volume of production was much less than for the backlog of unfilled orders, suggesting production is being sustained by reducing the backlog of unfilled orders.
- The balance of opinion for orders received (+14) was also down from a peak in the October 1987 survey, but remained well above the previous year's result (-2).

Note to Users: Individual responses to the Business Conditions Survey are weighted by the value of the respondent's shipments reported to the annual Census of Manufactures. The proportions, therefore, reflect the magnitude of the individual manufacturer's contribution to the total. The balance is the difference between the proportion associated with the positivetype response (e.g. higher volume of production) and the proportion related to the negative-type response (e.g. lower volume of production). Both the raw data (raw) and seasonally adjusted (s.a.) data are given for the balance. The seasonally adjusted value for the neutral components (e.g. expected production about the same) is calculated by subtracting the sum of the seasonally adjusted values of the other two components from 100.

- There was little change from the October 1987 results in the balance for finished product inventories. The degree of concern is below a peak reached in April last year, but is comparable to the January 1987 survey.
- For sources of production difficulties, the only significant change was a decline in those citing shortages of skilled and unskilled labour as a problem. The decline followed increases in labour shortages for the April, July and October 1987 surveys.

(See charts on page 8 and table on page 9)

Data users should note the October 1987 results have been revised to include responses received after the first release of these results.

Available on CANSIM (raw data only): matrices 2843-2845.

Contact L. Deschambault (613-951-3507), Shipments, Inventories and Orders Section, Industry Division.



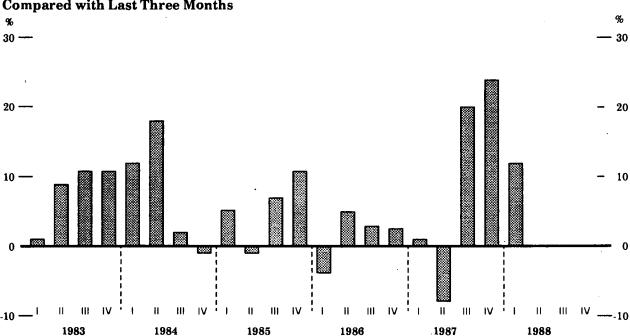
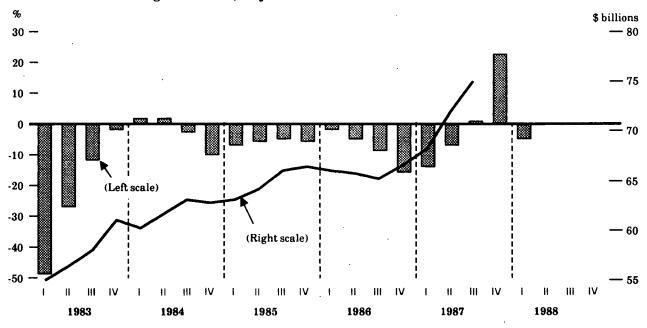


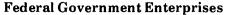
Chart-2
Comparison Between Balance of Opinion For Present Backlog of Unfilled Orders (Left Scale) and The Real Gross Domestic Product At Factor Cost in 1981 Prices (Right Scale)
For All Manufacturing Industries, Adjusted For Seasonal Variation



Business Conditions Survey, Canadian Manufacturing Industries October 1987

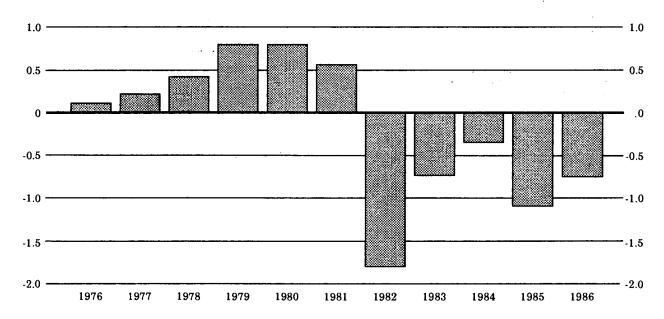
All Manufacturing Industries	Jan. 1987	Apr. 1987	July 1987	Oct. 1987	Jan. 1988
Volume of production during next	<u>-</u>				
three months compared with last three months will be:					`
Seasonally adjusted					
About the same	47	52	48	50	58
Higher	27	20	36	37	27
Lower	26	28	16	13	15
Balance	1	-8	20	24	12
Raw					
Balance	-3	11	9	23	5
Orders received are:					
Seasonally adjusted					
About the same	54	53	64	64	64
Rising	22	23	25	29	25
Declining	24	24	11	7	11
Balance	-2	-2	14	22	14
Raw					
Balance	-4	5	15	18	11
Present backlog of unfilled orders is:					
Seasonally adjusted			_		
About normal	66	62	73	59	87
Higher than normal	10	16	14	32	4
Lower than normal	24	22	13	9	9
Balance	-14	-8	1	23	-5
Raw					
Balance	-16	-5	4	22	11
Finished product inventory on hand is:					
Seasonally adjusted	<u>.</u>				
About right	80	67	78	69	71
Too low	5	8	8	11	9
Too high ¹	15	25	14	20	20
Balance	-10	-18	-7	-9	-11
Raw					
Balance	-11	-18	-6	-7	-12
Sources of production difficulties:					
Raw					
Working capital shortage	3	4	3	4	3
Skilled labour shortage	4	5	6	8	6
Unskilled labour shortage	1	1	2	3	1
Raw material shortage	3	4	7	6	7
Other difficulties	2	4	14	5	5
No difficulties	88	84	71	77	80

¹ No evident seasonality.



Net income after taxes

Billions of dollars



Federal Government Business Enterprises

October 1987

Financial Statistics, 1986

For 1986, federal government business enterprises showed a total net loss, after taxes, of \$757 million, down 35% from the \$1,167 million loss of 1985. Overall, the federal enterprises have shown losses since 1981, with a record loss of \$1,825 million recorded in 1982.

The privatization of a number of enterprises has resulted in a substantial reduction in total losses, due primarily to the elimination of non-profitable firms in manufacturing and wholesale trade. During 1986, De Havilland Aircraft of Canada, Pécheries Cartier, Canadair, Transport Route Canada and several other Crown Corporations were sold and their financial activities are no longer included in these statistics.

Industry Highlights

Mines, Quarries and Oil Wells

- The significant turnaround for federal enterprises in this industry reflected the improved financial results of Petro-Canada. The industry showed a net profit of \$64 million in 1986 compared to a loss of \$834 million in 1985.
- The Petro-Canada results were due to various factors, including the streamlining and integration of operations of previously independent firms and the partial recovery of international oil prices. In addition, 1985 figures incorporated a write-down of Petro-Canada's Canadian frontier oil and gas properties by \$865 million, due to low world oil prices.

(continued on page 11)

Manufacturing

- A net loss of \$51 million was posted in 1986 compared to a loss of \$311 million for the previous year.
- The federal government's sale of Canadair and De Havilland of Canada reduced the losses previously associated with this industry group.

Finance, Insurance and Real Estate

- Net losses increased for this group, to \$293 million in 1986 from \$89 million in 1985.
- Continuing economic difficulties in the agricultural sector forced the Farm Credit Corporation to increase its allowance for loan losses by \$219 million and the resulting charge to operations was a major factor in the corporation's loss of \$132 million.
- Cash payments of \$475 million under loan guarantees for the troubled institutions Bank of British Columbia and the Northwest Trust Company resulted in greater losses for the Canada Deposit Insurance Corporation in 1986 than in 1985.

Wholesale Trade

- Enterprises in this industry recorded a net loss of \$98 million in 1986 versus a profit of \$364 million in 1985.
- Price-depressing stocks of wheat and coarse grains, which continued to build on the world markets, and large export subsidies offered by the United States and the European Economic Community depressed earnings for the Canadian Wheat Board. The federal export agency registered a loss of \$154 million in 1986, one of the largest in its 50-year history.

 Pêcheries Cartier Inc., which had recorded a loss as a federal enterprise in 1985, was sold to the private sector in 1986.

Transportation and Storage

- Losses for enterprises in this industry rose from \$74 million in 1985 to \$233 million in 1986.
- Significant factors in Canadian National Railway's loss of \$256 million were nonrecurring items amounting to \$122 million.
- Air Canada posted a record profit for the last six months of 1986 and recorded an overall profit for the year of \$10 million versus a loss of \$32 million in 1985.

A historical review of the operations and financial position of federal government enterprises from 1976 to 1986 is included in Federal Government Enterprise Finance, 1986. A presentation on debt forgiveness and on conversions of debt to equity (capital stock or contributed surplus) is included as an added feature of this edition.

(see table on page 12)

Available on CANSIM: income and expense – matrices 3214-3222; unappropriated surplus – matrices 3223-3231; and assets, liabilities and net worth – matrices 3232-3240.

Order the 1986 issue of Federal Government Enterprise Finance (61-203, \$25), available March. Contact Waneta Featherstone (613-951-1838) or Richard Sauriol (613-951-1832), Assets, Liabilities and Enterprises Section, Public Institutions Division.

The Daily, February 9, 1988

Federal Government Enterprises Net Income (Loss) after Taxes (millions of dollars)

Year	Trans- porta- tion and Storage	Com- muni- cation	Elec- tric Power	Manu- fac- turing	Mines Quarries and Oil Wells	Whole- sale Trade	Finance Insurance and Real Estate	Govern- ment Ser- vices	Total
1976	(205)	(20)	(6)	. 7	14	224	116	(7)	123
1977	(223)	(41)	0	(1)	22	237	169	69	232
1978	34	(38)	0	20	26	173	153	63	431
1979	156	(20)	1	104	43	431	68	28	811
1980	116	(5)	0	157	83	719	(247)	(14)	809
1981	179	(4)	0	(9)	64	527	(168)	(12)	5 77
1982	(358)	(311)	7	(1,635)	4	566	(84)	(14)	(1,825)
1983	62	(310)	6	(544)	(12)	397	(329)	(13)	(743)
1984	117	(412)	6	(192)	100	624	(587)	(14)	(358)
1985	(74),	(200)	(6)	(311)	(834)	364	(89)	(17)	(1,167)
1986	(233)	(123)	(2)	(51)	64	. (98)	(293)	(21)	(757)

Data Availability Announcements

Industrial Research and Development

1988

A recent survey of the larger R&D performers shows that product development accounts for almost 70% of industrial R&D expenditures.

The first 1988 issue of Science Statistics presents the R&D expenditures of major industry groups for basic research, product development, process development, and the development of new technical services. For more information, consult Science Statistics, Volume 12, No. 1 (catalogue no. 88-001).

Footwear Statistics

December 1987

Canadian manufacturers produced 2,240,441 pairs of footwear in December 1987, a decrease of 5.2% from the 2,362,572 pairs produced a year earlier.

Year-to-date production for January to December 1987 period totalled 38,777,484 pairs of footwear, down 9.9% from 43,046,726 pairs produced during the same period in 1986.

Available on CANSIM: matrix 8.

Order the December issue of Footwear Statistics (33-002, \$4.50/\$45), to be released the week of February 19. Contact Carla Mouradian (613-951-3510), Industry Division.

Shipments of Solid Fuel Burning Heating Products

Fourth Quarter 1987

Shipments of solid fuel burning heating products totalled \$21.58 million for the fourth quarter of 1987, a decrease of 0.1% from the \$21.61 million shipped during the previous quarter. Year-to-date shipments of solid fuel burning heating products totalled \$67.1 million.

Manufacturers' shipments of Canadian made solid fuel burning heating products are now available, as are data on the number of units shipped.

Order the fourth quarter 1987 issue of Shipments of Solid Fuel Burning Heating Products (25-002, \$3/\$12), scheduled for release the week of February 22. Contact Michel J. Cormier (613-951-3522), Industry Division.

Sawmills in British Columbia

November 1987

Sawmills in British Columbia produced 3 007 700 cubic metres (1,274.6 million board feet) of lumber and ties in November 1987, an increase of 63.0% over the 1 844 800 cubic metres (781.8 million board feet) produced in November 1986.

January to November 1987 production was 34 379 200 cubic metres (14,569.1 million board feet), an increase of 18.4% over the 29 030 400 cubic metres (12,302.4 million board feet) produced over the same period in 1986.

Available on CANSIM: matrix 53 (series 1.2, 2.2).

For further information, order the November 1987 issue of Production, Shipments and Stocks on Hand of Sawmills in British Columbia (35-003, \$6/\$60), to be released the week of February 15. Contact Jock Dobie (604) 666-2671, Pacific Region, Statistics Canada, Sinclair Centre, 757 West Hastings Street, Vancouver, B.C. V6C 3C9.

Electric Storage Batteries December 1987

Canadian manufacturers of electric storage batteries sold 331,615 automotive replacement batteries in December 1987, an increase of 54.2% from the 215,059 batteries sold a year earlier.

Cumulative sales amounted to 2,817,034 automotive replacement batteries from January to December 1987, up 10.3% from 2,555,068 for the same period in 1986.

Information on sales of other types of storage batteries is also available.

Order the December 1987 issue of Factory Sales of Electric Storage Batteries (43-005, \$4.50/\$45), available the week of February 22. Contact J.P. Beauparlant (613-951-3526), Industry Division.

The Daily

Statistics Canada's Official Release Bulletin for Statistical Information

Catalogue 11-001E. Price: Canada \$100/year; other countries \$125/year

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Senior Editor: Greg Thomson (613-951-1103) Editor: Joan Farley (613-951-1198)

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Publications Released

Pulpwood and Wood Residue Statistics, October 1987. Catalogue number 25-001 (Canada: \$5.50/\$55; Other Countries: \$6.50/\$65).

Pulpwood and Wood Residue Statistics, November 1987. Catalogue number 25-001 (Canada: \$5.50/\$55; Other Countries: \$6.50/\$65).

Inventories, Shipments and Orders in Manufacturing Industries, October 1987. Catalogue number 31-001 (Canada: \$16.50/\$165; Other Countries: \$17.50/\$175).

Oils and Fats, October 1987. Catalogue number 32-006 (Canada: \$4.50/\$45; Other Countries: \$5.50/\$55).

Production and Disposition of Tobacco Products, December 1987. Catalogue number 32-022 (Canada: \$4.50/\$45; Other Countries: \$5.50/\$55).

Cement, November 1987. Catalogue number 44-001 (Canada: \$4.50/\$45; Other Countries: \$5.50/\$55).

Gypsum Products, November 1987. Catalogue number 44-003 (Canada: \$4.50/\$45; Other Countries: \$5.50/\$55).

Railway Operating Statistics, July 1987. Catalogue number 52-003 (Canada: \$9.50/\$95; Other Countries: \$10.50/\$105).

Department Store Monthly Sales, by Province and Metropolitan Area, November 1987. Catalogue number 63-004 (Canada: \$2.50/\$25; Other Countries: \$3.50/\$35).

Summary of Canadian International Trade, November 1987. Catalogue number 65-001 (Canada: \$16.50/\$165; Other Countries: \$17.50/\$175).

Federal Government Employment, July-September 1987. Catalogue number 72-004 (Canada: \$22/\$88; Other Countries: \$23/\$92).

Travel-log, Vol. 6, No. 4. Catalogue number 87-003 (Canada: \$9/\$36; Other Countries: \$10/\$40).

Science Statistics, Vol. 12, No. 1 – Applications of Industrial R&D, 1986. Catalogue number 88-001 (Canada: \$6.50/\$65; Other Countries: \$7.50/\$75).

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