



The Daily

Statistics Canada

Monday, February 24, 1992

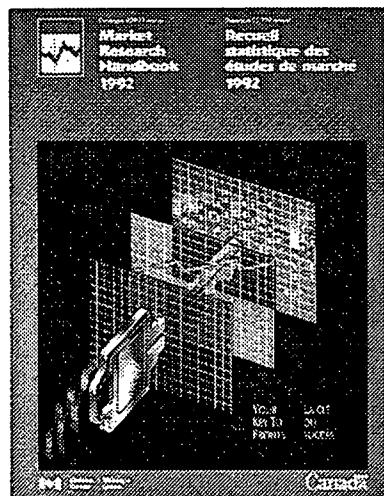
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MAJOR RELEASES

- **Wholesale Trade, December 1991** 3
Wholesale merchants' sales increased for the second consecutive month (+ 0.6%).
- **Multifactor Productivity, 1990** 6
Preliminary estimates of Canadian multifactor productivity for the business sector declined strongly in 1990, due in part to lower utilization of the available capital stock. Nevertheless, productivity growth since the beginning of the business cycle upswing in 1982 has been higher than the historical average.
- **Department Store Sales and Stocks, December 1991** 8
Seasonally adjusted, department store sales totalled \$1,091 million in December, a 2.2% increase from November 1991.

(Continued on page 2)



Market Research Handbook 1992

The *Market Research Handbook* is a complete source of information on Canadian consumer and industrial markets.

In addition to providing a demographic overview of Canada's provinces and territories, this edition has been extensively updated to offer comprehensive profiles of 45 urban centres across the country. The most recent data have been added on international trade, personal income and expenditures, the merchandising and services sectors, industry price indexes, the labour force, and other information essential to developing sound marketing and expansion strategies. In addition, for the first time, the *Handbook* contains information on the growth and sales of chain stores in shopping centres, as well as statistics on detailed commodities sold through retail outlets.

With over 600 pages, the 1992 *Market Research Handbook* contains over 200 statistical tables and more than 50 charts and graphs. Footnotes accompany most data tables and refer to other Statistics Canada sources for more detailed data.

The 1992 *Market Research Handbook* (63-224, \$94) is now available. See "How to Order Publications". For additional information contact Gerald Snyder, Small Business and Special Surveys Division (613-951-3561).



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Canada

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MAJOR RELEASES

Wholesale Trade

December 1991

Highlights

Seasonally Adjusted Sales

- Preliminary estimates indicate that wholesale merchants' sales were \$15.2 billion in December, up 0.6% from the previous month. While this represented the second consecutive sales increase, it came mainly from wholesalers of other machinery, equipment and supplies, which increased 6.0% due mainly to strong computer sales.
- Other sales increases (+2.3%) came from suppliers of other products (farm and paper products, agricultural supplies, industrial and household chemicals, etc.) and from farm machinery, equipment and supplies (+1.4%). But six of the nine trade groups registered sales decreases. Leading the decline were drops registered by wholesalers of lumber and building materials (-7.8%), household goods (-5.1%), and apparel and dry goods (-4.0%).
- Regionally, modest sales increases were noted in Ontario (+1.9%), British Columbia (+3.8%), Newfoundland (+2.1%) and in the Yukon and the Northwest Territories (+4.5%). Elsewhere, lower sales were recorded in seven provinces, ranging from -0.3% in Quebec and Alberta to -12.4% in Nova Scotia.

Note to Users

Data collected and published for 1991 exclude provincial sales taxes and the Goods and Services Tax. Prior to January 1991, data include the Federal Sales Tax except for wholesalers who were licensed. Due to this change in indirect taxes, data for 1991 are not comparable with those of previous years.

- Total 1991 sales were \$176.3 billion, down 3.6% from 1990; however, after removing the effect of the change in indirect taxes, there was a year-over-year increase of approximately 1.0%.

Seasonally Adjusted Inventories

- In December, wholesale merchants' inventories were \$24.2 billion, up 1.3% from the previous month.
- The ratio of inventories-to-sales at the end of December was 1.59:1, up slightly from the 1.58:1 recorded the month before.

Available on CANSIM: matrices 649 (sales, seasonally adjusted), 648 (sales, not seasonally adjusted), 61 (inventories, seasonally adjusted) and 59 (inventories, not seasonally adjusted).

The December issue of *Wholesale Trade* (63-008, \$14.40/\$144) will be available the second week of March. See "How to Order Publications".

For more information on this release, contact Larry Murphy (613-951-9683) or Gilles Berniquez (613-951-3540), Industry Division.

Chart 1

Wholesale Merchants Sales

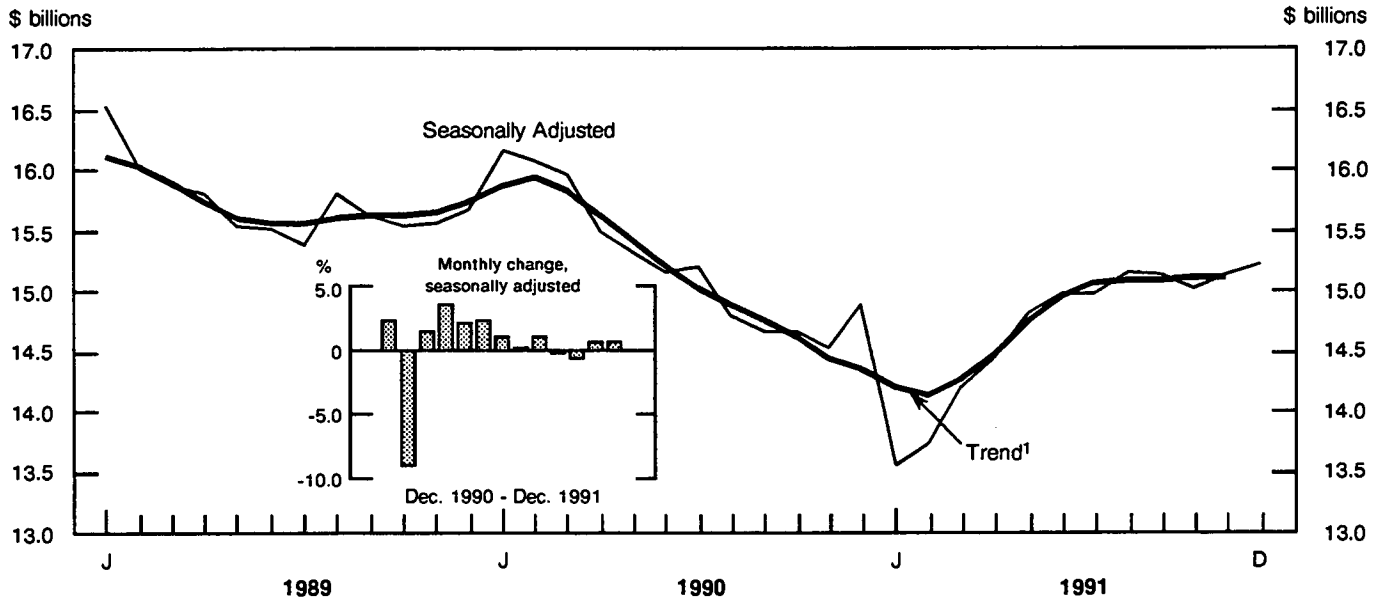
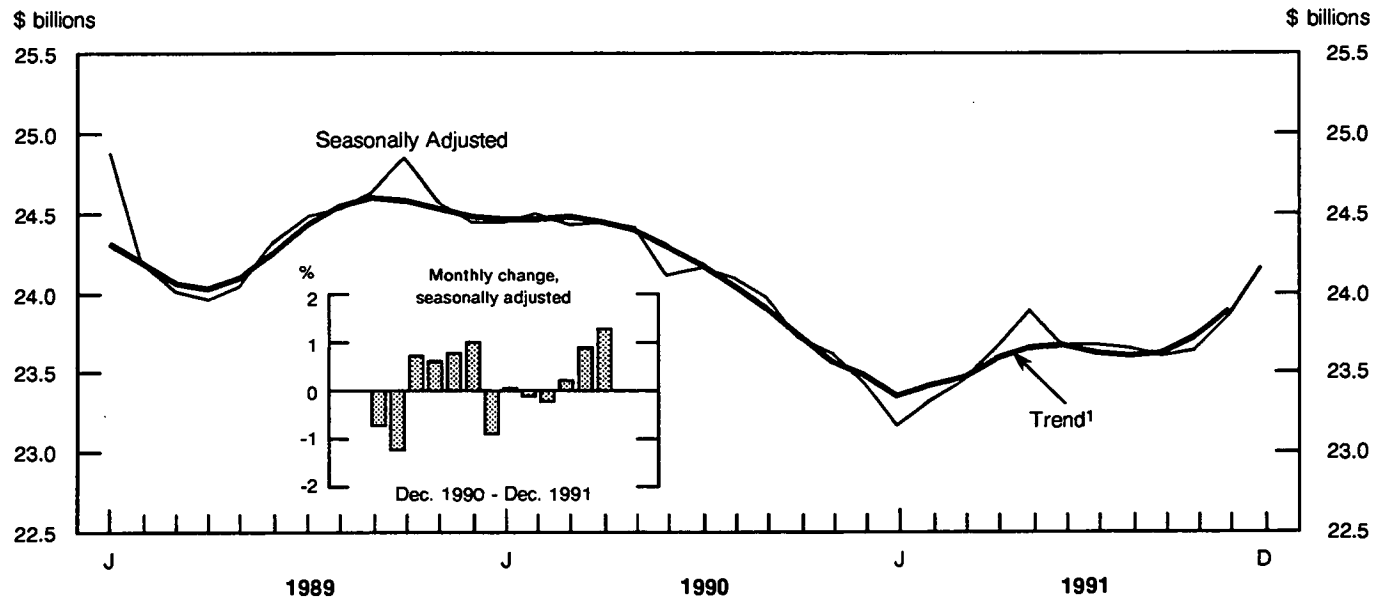


Chart 2

Wholesale Merchants Inventories



¹ The short-term trend represents a weighted average of data.

Wholesale Merchants' Sales, by Trade Group and Region
 December 1991

Trade group	Unadjusted				Seasonally Adjusted						
	Dec. 1990	Nov. 1991 ^r	Dec. 1991 ^p	Dec. 1991/ 1990 [*]	Dec. 1990	Sept. 1991 ^r	Oct. 1991 ^r	Nov. 1991 ^r	Dec. 1991 ^p	Dec./ Nov. 1991	Dec. 1991/ 1990 [*]
	millions of \$		%		millions of \$		%		%		
Canada											
Food, beverage, drug and tobacco products	3,584	3,896	3,820	6.6	3,639	3,869	3,836	3,863	3,853	-0.2	5.9
Apparel and dry goods	177	321	218	23.0	301	374	376	383	368	-4.0	22.1
Household goods	483	643	508	5.1	497	544	545	548	520	-5.1	4.6
Motor vehicles, parts and accessories	1,419	1,761	1,392	-1.9	1,740	1,798	1,740	1,708	1,702	-0.3	-2.2
Metals, hardware, plumbing and heating equipment and supplies	877	1,104	888	1.2	1,072	1,089	1,069	1,072	1,059	-1.2	-1.2
Lumber and building materials	933	1,344	916	-1.7	1,262	1,373	1,353	1,375	1,268	-7.8	0.4
Farm machinery, equipment and supplies	300	245	257	-14.4	332	303	302	295	299	1.4	-10.1
Other machinery, equipment and supplies	3,527	3,417	3,735	5.9	3,601	3,339	3,349	3,415	3,622	6.0	0.6
Other products	2,259	2,427	2,412	6.8	2,430	2,449	2,458	2,462	2,520	2.3	3.7
Total, all trades	13,560	15,158	14,146	4.3	14,874	15,137	15,027	15,121	15,210	0.6	2.3
Regions											
Newfoundland	160	180	163	2.2	176	170	166	169	172	2.1	-2.0
Prince Edward Island	34	39	39	13.3	31	39	38	38	37	-3.9	18.3
Nova Scotia	341	352	318	-6.9	337	362	357	368	322	-12.4	-4.5
New Brunswick	230	256	214	-6.6	242	254	241	245	222	-9.4	-8.3
Quebec	3,354	3,797	3,377	0.7	3,810	3,795	3,735	3,752	3,743	-0.3	-1.8
Ontario	5,492	6,262	5,911	7.6	6,084	6,210	6,188	6,256	6,375	1.9	4.8
Manitoba	431	499	440	1.9	452	513	502	509	491	-3.5	8.6
Saskatchewan	460	517	452	-1.8	495	499	497	498	492	-1.3	-0.7
Alberta	1,408	1,359	1,311	-6.9	1,484	1,369	1,377	1,360	1,357	-0.3	-8.6
British Columbia	1,636	1,881	1,906	16.5	1,743	1,905	1,910	1,906	1,979	3.8	13.6
Yukon and Northwest Territories	15	16	17	13.8	20	20	18	19	20	4.5	0.1

Wholesale Merchants' Inventories, by Trade

Trade group	Unadjusted				Seasonally Adjusted							
	Dec. 1990	Nov. 1991 ^r	Dec. 1991 ^p	Dec. 1991/ 1990 [*]	Dec. 1990	Sept. 1991 ^r	Oct. 1991 ^r	Nov. 1991 ^r	Dec. 1991 ^p	Dec./ Nov. 1991	Dec. 1991/ 1990 [*]	
	millions of \$		%		millions of \$		%		%			
Canada												
Food, beverage, drug and tobacco products	2,681	2,795	2,736	2.0	2,666	2,802	2,715	2,749	2,736	-0.5	2.6	
Apparel and dry goods	674	687	729	8.2	728	770	770	775	795	2.6	9.2	
Household goods	1,020	1,116	1,128	10.6	1,020	1,136	1,140	1,116	1,128	1.1	10.6	
Motor vehicles, parts and accessories	3,418	3,394	3,482	1.9	3,483	3,387	3,440	3,528	3,537	0.3	1.5	
Metals, hardware, plumbing and heating equipment and supplies	1,689	1,985	1,962	16.2	1,754	1,944	2,022	2,063	2,070	0.3	18.0	
Lumber and building materials	2,186	2,123	2,171	-0.7	2,311	2,239	2,256	2,247	2,267	0.9	-1.9	
Farm machinery, equipment and supplies	1,410	1,295	1,340	-4.9	1,441	1,341	1,358	1,348	1,361	1.0	-5.5	
Other machinery, equipment and supplies	6,676	6,951	6,983	4.6	6,934	6,963	6,957	7,090	7,230	2.0	4.3	
Other products	2,996	2,861	2,939	-1.9	3,100	3,018	2,981	2,929	3,036	3.7	-2.1	
Total, all trades	22,750	23,206	23,470	3.2	23,438	23,600	23,639	23,845	24,161	1.3	3.1	

* Percentage changes contained in these tables are not adjusted for the change in indirect taxes. Caution should be exercised in their use.

^r Revised figure.

^p Preliminary figure.

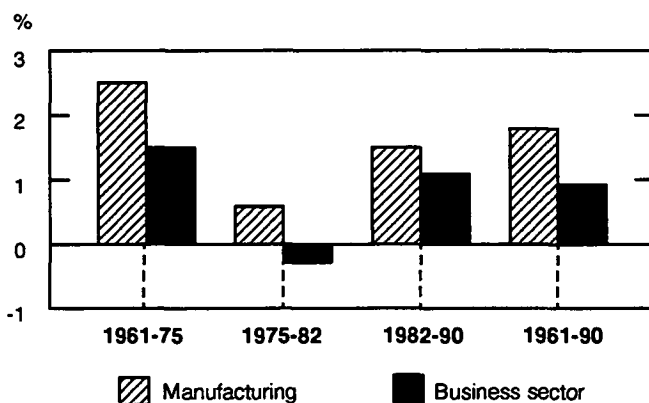
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Multifactor Productivity

1990

Canadian business sector multifactor productivity (MFP) declined 2.5% in 1990 following a decline of 0.8% in 1989. This decline left the 1990 productivity index standing at about the same level as in 1984. The efficiency losses can in part be attributed to excess capacity resulting from the contraction of output.

Average Growth Rate of Multifactor Productivity



Over the course of the present business cycle (1982-1990), the productivity of the business sector increased at an average annual rate of 1.1%. This performance is higher than the -0.3 average decrease recorded during the 1975-1982 business cycle, but it is lower than the 1.5% productivity increase reached during the 1961-1975 period. The recovery in the 1980s placed the 1982-1990 productivity performance higher (1.1%) than the historical 1961-1990 average of 0.9%.

Canadian manufacturing value-added MFP has now declined for three consecutive years, with the 1990 loss of 5.3% the worst since the 1982 recession. Over the current phase of the business cycle, value-added multifactor productivity increased at an average rate of 1.5%. This was above the average of the 1975-1982 business cycle (at 0.6%) but lower than the productivity growth during the 1961-1975 period (2.5%). In relation to the 1961-1990 historical average of 1.8%, the performance of the 1982-1990 cycle was only 1.5%.

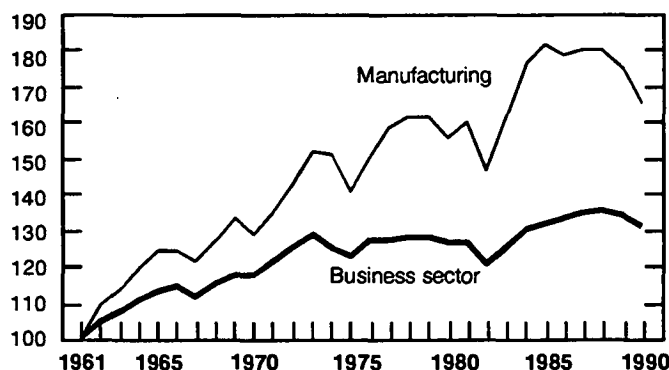
Note To Users

Productivity data reported here incorporate revisions affecting some of the underlying data. These revisions are as follows:

1. Reconciliation of the provincial and the national capital stock data resulted in revisions to the capital stock data of most industries with minor changes at the aggregate level.
2. Re-basing of the Labour Force Survey to the 1986 population census resulted in changes to employment data.
3. Input-output tables for 1987 were revised and the preliminary 1988 input-output tables were used for the first time. Additional information on these revisions is available on request.

Multifactor Productivity Indices

(1961 = 100)



The 1990 decline of -2.5% in business sector multifactor productivity was greater than the -1.2% decline of labour productivity (output per person), due to an increase in capital input that is included in the more comprehensive multifactor productivity measure.

The usefulness of the above aggregate productivity measures is enhanced by an examination of detailed industry results, which vary widely from one industry to another. These detailed results are also available today.

A Canada-United States comparison of official multifactor productivity is not recommended now because of pending U.S. revisions. The U.S. Bureau of Labor Statistics is in the process of incorporating important changes in the U.S. National Accounts (produced by the Department of Commerce), changes which are expected to affect historical multifactor productivity growth. The Bureau of Labor Statistics

has already incorporated some of these revisions into their labour productivity estimates, which has improved Canada's relative position compared to what was released in *The Daily* on December 16, 1991. For instance, for the current business cycle (1982-1990), the U.S. business sector output per person-hour was revised downward from an average of 1.5% to 1.2%, and in manufacturing it was revised downward from an average of 4.0% to 2.9%. The U.S. revised multifactor productivity report is scheduled for release in August 1992.

Available on CANSIM: matrices 7900 (multifactor productivity gross output), 7901 (net-gross output), 7902 (value-added), and 7903 (inter-industry).

These figures and related information will be available in the 1990 issue of *Aggregate Productivity Measures* (15-204, \$60). See "How to Order Publications".

For more detailed information, contact Aldo Diaz (613-951-3687), Input-Output Division.

Multifactor Productivity Measures, Canada 1961-1990

	Business Sector	Manufacturing Industries
	Indexes (1961 = 100)	
1961	100.0	100.0
1971	121.3	134.4
1981	126.4	160.2
1982	120.1	146.8
1983	124.6	160.4
1984	130.2	176.2
1985	131.5	181.7
1986	132.7	178.5
1987	134.6	180.3
1988	135.1	180.0
1989	134.0	174.8
1990	130.7	165.6
	Annual rate of change (%)	
1961-1990	0.9	1.8
1961-1975	1.5	2.5
1975-1982	-0.3	0.6
1982-1990	1.1	1.5
1985-1990	-0.1	-1.8
1984-1985	1.0	3.1
1985-1986	1.0	-1.7
1986-1987	1.4	1.0
1987-1988	0.4	-0.2
1988-1989	-0.8	-2.9
1989-1990	-2.5	-5.3

Department Store Sales and Stocks

December 1991

Highlights

Seasonally Adjusted Data

- Department store sales (including concessions) totalled \$1,091 million in December 1991, an increase of 2.2% from the previous month's revised total of \$1,068 million.
- The 2.2% increase for December 1991 returned sales to early 1991 levels. Nevertheless, December 1991 sales remained 10% below December 1990 levels.
- Department store stocks (at selling value) totalled \$5,273 million at the end of December, an increase of 1.6% from the November 1991 revised value of \$5,191 million.

Note to Users

Department store sales estimates exclude the Goods and Services Tax (GST). Prior to January 1991, sales data included the Federal Sales Tax (FST). Due to this change in indirect taxes, data for 1991 are not strictly comparable with those of previous years. For users interested in deriving comparable data, an estimate of the amount of FST included in department store sales for 1990 is available for Canada.

Available on CANSIM: matrices 112 level 1-3, series 4, 5 and 6.

The December 1991 issue of *Department Store Sales and Stocks* (63-002, \$13/\$130) will be available the third week of May. See "How to Order Publications".

For further information, contact Dave Roeske (613-951-3559), Retail Trade Section, Industry Division.

Department Store Sales, Canada (including concessions)

	Unadjusted			Seasonally Adjusted				
	Dec. 1990	Nov. 1991	Dec. 1991	Dec. 1990	Sept. 1991 ^r	Oct. 1991 ^r	Nov. 1991 ^r	Dec. 1991 ^P
	millions of \$			millions of \$				
Total Sales	2,275	1,420	2,014	1,231	1,067	1,059	1,068	1,091
Total Stocks	4,469	6,206	4,827	4,932	5,145	5,144	5,191	5,273
Stock to Sales Ratio	1.96	4.37	2.40	4.01	4.82	4.86	4.86	4.83

^P Preliminary

^r Revised

DATA AVAILABILITY ANNOUNCEMENTS

Local Government Finance – Financial Management System Basis

1991 Estimates

On a Financial Management System (FMS) basis, estimated total local government revenues for 1991 were \$62.8 billion, an increase of \$4.8 billion (8.2%) from 1990. Total expenditures were \$64.8 billion, an increase of \$5.1 billion (8.6%) from 1990. Both the revenue and expenditure increases were slightly greater than the 1985 to 1990 five-year average annual increases of 7.2% for revenues and 7.3% for expenditures.

Note to Users

In 1990, the Nova Scotia government legislated a change to the fiscal year for municipalities and other local bodies in Nova Scotia (Bill 100). The 1991 fiscal year begins January 1, 1991, and ends March 31, 1992, continuing on an April 1 to March 31 basis thereafter. In order to avoid a break in the series, the 1991 data for entities covered by this bill have been adjusted to a twelve-month basis.

The Financial Management System (FMS) provides a standardized presentation of government accounting for the federal, provincial and local governments in Canada. The individual governments' accounting systems are not directly comparable because the policies and structures of governments differ. The FMS adjusts data from government budgets, estimates, public accounts and other records to provide detailed, inter-governmentally comparable data as well as compatible national aggregates that are consistent over time. Thus, FMS statistics may not accord with the figures published in government financial statements.

Local government estimates are prepared by Public Institutions Division from various data sources that include a survey of local government budgetary intentions for 1991, other local government surveys, administrative documents of provincial and local governments, and information obtained from provincial government ministries and other divisions within Statistics Canada.

Federal Government Employment in Metropolitan Areas

(Data not adjusted for seasonal variations)
September 1991

- Federal government employment (which excludes government business enterprises) in Census Metropolitan Areas (CMAs) totalled 244,500 in September 1991, an increase of 1.6% over the previous year. Hiring in the Department of National Revenue for GST-related programs led the increase. Federal government employment in CMAs represented 65% of total federal government employment as of September 1991.

Definitions and Data Availability

Government includes departments, agencies, boards, commissions, funds established and controlled by governments, public educational institutions, cultural facilities, hospitals, military personnel, RCMP uniformed personnel, and bodies that administer universal pension plans.

Census Metropolitan Area (CMA) is the main labour market area of an urbanized core having a population of 100,000 or more. The core is the central, continuously built-up area of an urban centre. The term CMA was created by Statistics Canada, and the areas within the CMAs are defined by the Agency. The CMAs are usually known by the name of their largest city.

The number of employees are shown as "on strength" and include employees in the CMAs who are full-time, part-time and casual employees. "On strength" includes paid employees who report to work and persons who are not being paid, but who are considered to be employees, such as those on strike or on unpaid leave.

Available on CANSIM: matrix 2719 (annual employment and remuneration data).

Available on CANSIM: matrices 2764-2776.

For further information on this release, contact Robert Loggie (613-951-1809) or Jacinthe Bourdeau (613-951-1949), Public Institutions Division.

Data are also available through special tabulation. For more information on Public Institutions Division products or services, contact Donald Dubreuil (613-951-0767). ■

Data are available in standard format and in special tabulations from the Public Institutions Division. Data are available by department, occupational category, and province.

For further information on this release, please contact Pearl Allen (613-951-1845) or Ishtiaq Khan (613-951-8306), Public Institutions Division.

For information on Public Institutions Division products, contact Donald Dubreuil (613-951-0767) or (FAX 613-951-0661). ■

Local Government Long-term Debt

January 1992

Estimates of the accumulated long-term debt of local governments in Canada, except Ontario, at the end of January 1992 are now available.

For further information on this release, contact Marlene Vollmer (613-951-1830), Public Institutions Division.

For more information on Public Institutions Division products or services, contact Donald Dubreuil (613-951-0767). ■

Air Carrier Operations in Canada

April-June 1991

Highlights

- Canadian Level I-III air carriers registered an operating loss of \$20 million in the second quarter of 1991 and a net loss of \$52 million. This compared with operating income of \$77 million and net income of \$37 million in the same period of 1990.
- In the second quarter of 1991, passenger traffic declined 22% from the previous year for Air Canada and 18% for Canadian Airlines International, each reported approximately five billion passenger-kilometres.
- Compared to the second quarter of 1990, Canadian Level I-IV air carriers reported a 17% decrease in domestic passenger-kilometres, an 11% decrease in transborder (Canada-U.S.) passenger-kilometres, and a 17% decrease in international passenger-kilometres.
- For Level I carriers, operating revenues decreased 4% while operating expenses increased 2% compared to the second quarter of 1990.
- During the second quarter of 1991, 64% of domestic scheduled passengers travelled on discount fares, up from 63% in 1990. For the international markets, over two out of every three (70%) scheduled passengers flew on discount fares.

- During the second quarter of 1991, the average fare paid by air passengers on all domestic city-pairs was \$190, up 1% from the previous year. The average fare paid by international passengers was \$351, an increase of 5% from a year earlier.

The April-June 1991 issue of *Canadian Carrier Operations in Canada* (51-002) will be released shortly.

For more information on this release, contact Bradley Snider (819-997-6195), Aviation Statistics Centre, Transportation Division. ■

Shipments of Office Furniture Products

Fourth Quarter 1991

For the quarter ending December 31, 1991, shipments of office furniture products totalled \$180.7 million, a decrease of 6.9% compared to the \$194.0 million shipped during the same quarter of the previous year.

Data on manufacturers' shipments of office furniture products for the fourth quarter of 1991 are now available. Data for province of destination as well as exports are also available.

The December 1991 issue of *Shipments of Office Furniture Products* (35-006, \$6.75/\$27) will be available at a later date.

For more detailed information on this release, contact Keith Martin (613-951-3518), Industry Division. ■

Production, Shipments and Stocks on Hand of Sawmills in British Columbia

December 1991

Sawmills in British Columbia produced 2 211 600 cubic metres of lumber and ties in December 1991, an increase of 2.4% from the 2 159 800 cubic metres produced in December 1990.

January to December 1991 production was 31 406 100 cubic metres, a decrease of 6.3% from the 33 514 300 cubic metres produced over the same period in 1990.

Available on CANSIM: matrix 53 (series 1.2, 2.2 and 3.2).

The December 1991 issue of *Production, Shipments and Stocks on Hand of Sawmills in British Columbia* (35-003, \$7.10/\$71) will be available at a later date. See "How to Order Publications".

For more detailed information on this release, contact Jock Dobie (604-666-2671), Pacific Region, Statistics Canada, Sinclair Centre, 757 West Hastings Street, Vancouver, B.C. V6C 3C9.

Production, Shipments and Stocks on Hand of Sawmills East of the Rockies

December 1991

Production of lumber in sawmills east of the Rockies increased 6.5% to 1 405 564 cubic metres in December 1991, up from 1 319 508^r (revised) cubic metres produced in December 1990.

Stocks on hand at the end of December 1991 totalled 2 811 669 cubic metres, an increase of 12.5% compared to 2 498 299 cubic metres in December 1990.

Year-to-date production in 1991 amounted to 20 242 141 cubic metres, a decrease of 5.4% compared to 21 395 022^r cubic metres for the same period in 1990.

Available on CANSIM: matrices 53 and 122 (series 2).

The December 1991 issue of *Production, Shipments and Stocks on Hand of Sawmills East of the Rockies* (35-002, \$10/\$100) will be available at a later date. See "How to Order Publications".

For more detailed information on this release, contact Jacques Lepage (613-951-3516), Industry Division. ■

Pack of Tomatoes and Tomato Products 1991

The data on pack of processed tomatoes for 1991 are now available.

The publication *Pack of Tomatoes and Tomato Products* (32-237, \$13) will be released at a later date.

For further information, contact Peter Zylstra (613-951-3511), Industry Division. ■



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PUBLICATIONS RELEASED

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US\$146; Other Countries: US\$17.10/US\$171).

Shipments of Plastic Film and Bags

Manufactured from Resin, Quarter Ended

December 1991.

Catalogue number 47-007

(Canada: \$6.75/\$27; United States: US\$8/US\$32;
Other Countries: US\$9.50/US\$38).

Market Research Handbook, 1992.

Catalogue number 63-224

(Canada: \$94; United States: US\$113;
Other Countries: US\$132).

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**The
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