



The Daily

Statistics Canada

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MAJOR RELEASES

- **Retail trade, March 1994** 3
Consumer spending on goods has continued to increase at a robust pace since November 1993. Seasonally adjusted retail sales rose 1.3% to \$17.2 billion in March, the fifth consecutive monthly increase. This is the longest series of consecutive increases in the last 10 years.
- **Preliminary statement of Canadian international trade, March 1994** 7
Exports were up a record 8.1% in March, but were outpaced by imports, which increased a record 9.8%. As a result, Canada's merchandise trade surplus fell by \$188 million to \$659 million.

DATA AVAILABILITY ANNOUNCEMENTS

- Export and import price indexes, March 1994 10
- Steel primary forms, week ending May 14, 1994 10

(continued on page 2)

Canadian economic observer

May 1994

The May 1994 issue of *Canadian economic observer*, Statistics Canada's flagship publication for economic statistics, presents a summary of the economy, the major economic events in April, and two feature articles: "Unemployment insurance, temporary layoffs and recall expectations" and "The underground economy—a Statistics Canada perspective". A statistical summary contains a wide range of tables and graphs on the principal economic indicators for Canada, the provinces and the major industrial nations.

The May 1994 issue of *Canadian economic observer* (11-010, \$22/\$220) is now available. See "How to order publications".

For further information on this release, contact Cindy Bloskie (613-951-3634), Current Economic Analysis Division.



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DATA AVAILABILITY ANNOUNCEMENTS—concluded

Railway carloadings, nine-day period ending April 30, 1994	10
Electric lamps, April 1994	10
Corrugated boxes and wrappers, April 1994	10
Restaurants, caterers and taverns, March 1994	10
Soft drinks, April 1994	11
Average prices of selected farm inputs, April 1994	11
Stocks of frozen poultry products, May 1, 1994	11

PUBLICATIONS RELEASED

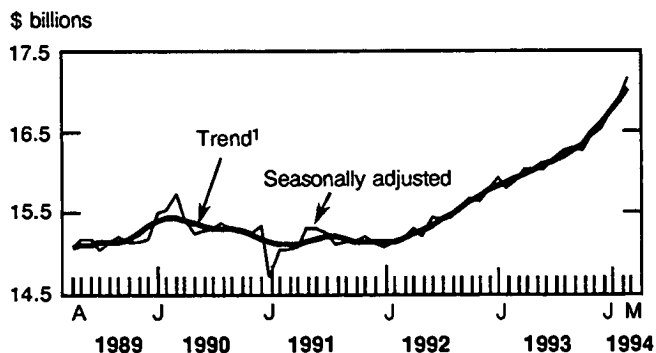
MAJOR RELEASES

Retail trade

March 1994 (preliminary)

Consumer spending on goods has been increasing generally since the beginning of 1992, but the growth in retail sales has been more robust since November 1993. March's sales increase was the fifth in a row, the longest series of consecutive increases in the last 10 years.

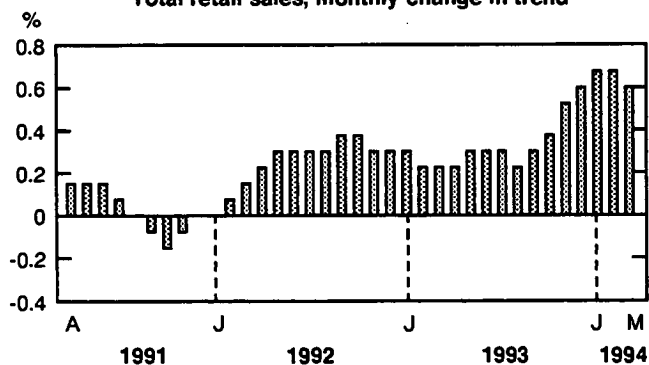
Robust increases in retail sales since November 1993



Data prior to 1991 have been adjusted to remove the Federal Sales Tax to be comparable to January 1991 and subsequent data.

¹ Trend represents smoothed seasonally adjusted data.

Total retail sales, monthly change in trend



Seasonally adjusted retail sales rose 1.3% to \$17.2 billion in March following similar increases in the previous two months. The strength in March came from all sectors, but was led mainly by automotive merchants. This overall increase was not

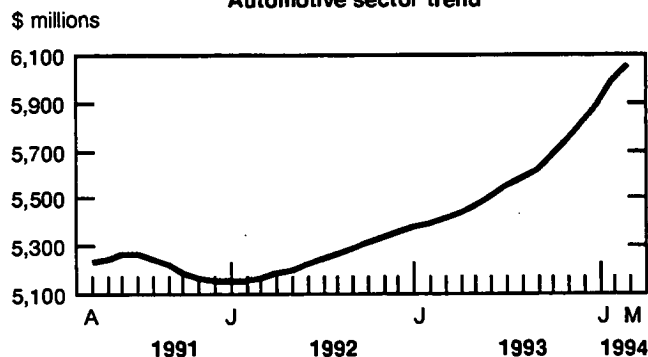
widespread among the provinces, since only six reported higher sales in March. The increases since the end of 1993 resulted in a strong 3.2% gain in the first quarter of 1994.

Since November 1993, most sectors reported higher sales. However, the automotive sector has been the main contributor to the growth of retail sales. The food and the general merchandise merchants have also been important contributors to this strength.

Automotive merchants led the strength in March

All retail trade sectors grew in March. The largest increase was reported by automotive merchants (+1.8% to \$6.1 billion), continuing the upward movement observed since mid-1993.

Automotive merchants were the main contributor to the March growth
Automotive sector trend



¹ Trends represent smoothed seasonally adjusted data.

Two of the three components of the automotive sector recorded higher sales in March. Sales by motor vehicle and recreational vehicle dealers (which also includes used car sales) rose 2.9%—the 10th consecutive monthly increase despite a slight decline in the number of new motor vehicles sold (-0.4%) in March. Sales by automotive parts, accessories and services outlets advanced 1.4% after a 3.2% decline in February. Partly offsetting this increase, gasoline service stations' sales fell 1.5%—the third decrease in four months.

General merchandise merchants (retailers, such as department stores, primarily engaged in selling a wide range of commodities) reported a 1.7% sales increase in March—the ninth consecutive monthly increase.

Mixed provincial patterns

Since 1993, all provinces have registered fluctuating retail sales around a generally upward movement. Of the six provinces reporting higher sales in March, Ontario and Alberta recorded the most significant increases. The 2.3% increase in Ontario was the second consecutive strong gain. Sales by retailers in Quebec fell for the second month following a robust gain in January. Sales in British Columbia flattened in March after generally steady growth since 1992.

Quarterly sales

Total seasonally adjusted retail sales increased 3.2% in the first quarter of 1994. This gain was much higher than the growth reported for each of the four quarters of 1993. Of the six sectors reporting higher sales in the first quarter of 1994, automotive and general merchandise merchants were the main contributors to the growth.

All provinces recorded growth in the first quarter of 1994. Quebec reported a strong performance (+4.3%) despite two monthly decreases. Retail sales in the Atlantic provinces rebounded in the first

quarter of 1994; all four provinces reported lower sales in the fourth quarter of 1993.

Unadjusted

Year-over-year unadjusted sales for all trade groups except gasoline service stations increased, resulting in a strong 10.5% rise (to \$16.4 billion) for the March 1993 to March 1994 period. For a second consecutive month, the biggest increases were posted by motor vehicle and recreational vehicle dealers (+18.9% to \$4.2 billion) and shoe stores (+16.4% to \$0.1 billion). Sales by gasoline service stations declined (-3.3% to \$1.1 billion), the fourth consecutive decrease.

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

The March 1994 issue of *Retail trade* (63-005, \$20/\$200) will be available the first week of June. See "How to order publications".

For further information on this release, contact Pierre Desjardins (613-951-9682), Retail Trade Section, Industry Division. □

Retail sales

Trade group	March 1993	December 1993 ^r	January 1994 ^r	February 1994 ^r	March 1994 ^p	February 1994 ^r to March 1994 ^p	March 1993 to March 1994 ^p
	\$ millions				% change		
	seasonally adjusted						
Food	4,228	4,335	4,373	4,390	4,415	0.6	4.4
Supermarkets and grocery stores	3,936	4,061	4,092	4,107	4,126	0.5	4.8
All other food stores	293	274	282	283	289	2.1	-1.1
Drug							
Drug and patent medicine stores	993	994	1,014	1,006	1,014	0.8	2.1
Clothing	932	956	953	970	983	1.4	5.5
Shoe stores	131	135	144	146	145	-1.2	10.3
Men's clothing stores	141	149	154	152	155	1.9	9.4
Women's clothing stores	314	321	306	322	327	1.6	4.2
Other clothing stores	346	352	349	350	357	2.0	3.2
Furniture	875	900	873	878	889	1.3	1.6
Household furniture and appliance stores	691	707	681	683	694	1.6	0.5
Household furnishings stores	184	193	192	194	195	0.4	5.8
Automotive	5,378	5,787	5,912	6,013	6,123	1.8	13.8
Motor vehicle and recreational vehicle dealers	3,294	3,702	3,734	3,869	3,982	2.9	20.9
Gasoline service stations	1,193	1,151	1,169	1,168	1,151	-1.5	-3.5
Automotive parts, accessories and services	892	934	1,008	976	989	1.4	11.0
General merchandise stores	1,709	1,734	1,740	1,812	1,843	1.7	7.9
Retail stores n.e.c.	1,817	1,827	1,863	1,874	1,897	1.2	4.4
Other semi-durable goods stores	550	564	564	559	564	0.9	2.5
Other durable goods stores	428	439	453	460	477	3.6	11.5
All other retail stores n.e.c.	839	824	846	855	856	0.2	2.0
Total, retail sales	15,933	16,534	16,728	16,943	17,164	1.3	7.7
Total excluding motor vehicle and recreational vehicle dealers	12,639	12,832	12,994	13,074	13,182	0.8	4.3
Department store type merchandise	5,487	5,588	5,597	5,685	5,770	1.5	5.2
Provinces and territories							
Newfoundland	276	279	285	282	286	1.4	3.8
Prince Edward Island	69	70	76	73	73	0.7	6.8
Nova Scotia	513	528	552	547	562	2.8	9.4
New Brunswick	408	413	425	427	417	-2.4	2.2
Quebec	3,882	4,034	4,203	4,177	4,170	-0.2	7.4
Ontario	5,909	6,066	6,035	6,217	6,360	2.3	7.6
Manitoba	557	557	567	585	580	-0.8	4.2
Saskatchewan	472	499	496	499	501	0.4	6.1
Alberta	1,641	1,768	1,740	1,776	1,854	4.4	13.0
British Columbia	2,157	2,265	2,294	2,307	2,306	--	6.9
Yukon	17	17	17	17	17	-0.1	-0.7
Northwest Territories	33	37	38	38	39	1.5	18.8

^p Preliminary figures.

^r Revised figures.

n.e.c. Not elsewhere classified.

-- Amount too small to be expressed.

Retail sales

Trade group	March 1993	February 1994 ^r	March 1994 ^p	March 1993 to March 1994 ^p
	\$ millions			% change
	unadjusted			
Food	3,974	3,893	4,371	10.0
Supermarkets and grocery stores	3,714	3,654	4,090	10.1
All other food stores	260	239	281	7.9
Drug				
Drug and patent medicine stores	969	912	1,000	3.3
Clothing	751	603	829	10.3
Shoe stores	102	86	118	16.4
Men's clothing stores	103	87	116	12.5
Women's clothing stores	258	206	282	9.4
Other clothing stores	289	225	312	8.1
Furniture	793	673	821	3.5
Household furniture and appliance stores	624	526	644	3.2
Household furnishings stores	168	148	176	4.7
Automotive	5,509	4,843	6,238	13.2
Motor vehicle and recreational vehicle dealers	3,556	3,071	4,227	18.9
Gasoline service stations	1,138	1,027	1,100	-3.3
Automotive parts, accessories and services	815	744	911	11.7
General merchandise				
General merchandise stores	1,417	1,249	1,593	12.4
Retail stores n.e.c.	1,456	1,357	1,585	8.9
Other semi-durable goods stores	434	401	459	5.8
Other durable goods stores	325	324	372	14.4
All other retail stores n.e.c.	696	632	754	8.3
Total, retail sales	14,868	13,529	16,437	10.5
Total excluding motor vehicle and recreational vehicle dealers	11,312	10,458	12,209	7.9
Department store type merchandise	4,689	4,162	5,074	8.2
Provinces and territories				
Newfoundland	251	218	270	7.3
Prince Edward Island	58	54	64	10.0
Nova Scotia	468	423	526	12.5
New Brunswick	370	338	394	6.6
Quebec	3,606	3,284	4,029	11.7
Ontario	5,485	4,965	6,022	9.8
Manitoba	513	475	563	9.7
Saskatchewan	443	403	484	9.2
Alberta	1,538	1,417	1,778	15.6
British Columbia	2,091	1,908	2,256	7.9
Yukon	15	13	14	-3.0
Northwest Territories	30	31	37	22.9

^p Preliminary figures.

^r Revised figures.

n.e.c. Not elsewhere classified.

Preliminary statement of Canadian international trade

March 1994

Seasonally adjusted exports were up \$1.2 billion in March, reaching a record \$16.7 billion. Exports in all commodity sectors increased in the month, with particular strength in automotive products (\$348 million), agricultural and fishing products (\$300 million), machinery and equipment (\$228 million), and forestry products (\$179 million).

Seasonally adjusted imports were up \$1.4 billion in March, reaching a record \$16 billion. Although imports were up in all sectors, the bulk of the growth came from automotive products (\$598 million), machinery and equipment (\$441 million), and consumer goods (\$123 million).

With imports from the United States up by \$840 million and exports up by \$668 million, the trade surplus with the United States fell to \$1.9 billion in March.

Because imports increased more than exports, Canada's merchandise trade surplus fell by \$188 million to \$659 million.

Merchandise trade is only one component of the current account of Canada's balance of payments. Other components include services transactions, investment income, and transfers. In 1993, the overall merchandise trade surplus of \$11.7 billion contrasted with a current-account deficit of \$25.3 billion. On the other hand, merchandise trade with the United States was particularly strong in 1993, helping to generate a current-account surplus of \$2.3 billion.

Export trends

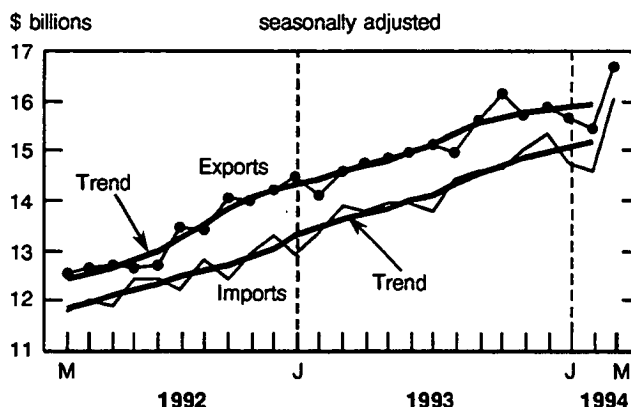
On a trend basis, exports have been on the rise for 27 months, growing 34% over that time. Monthly growth has averaged 0.9% in the past year. Excepting the OECD countries and the United States, the export trend has been negative for Canada's major trading partners.

The trend increased in the latest period for exports of machinery and equipment, energy products, industrial goods and materials, and forestry products.

Machinery and equipment exports grew 2.2% in the latest month, with all components registering increases. Exports of transportation equipment grew for the seventh month in a row, reaching a level nearly 40% above the most recent trough in July 1993. Exports of office machines were also strong; they have grown 11% in the latest five months.

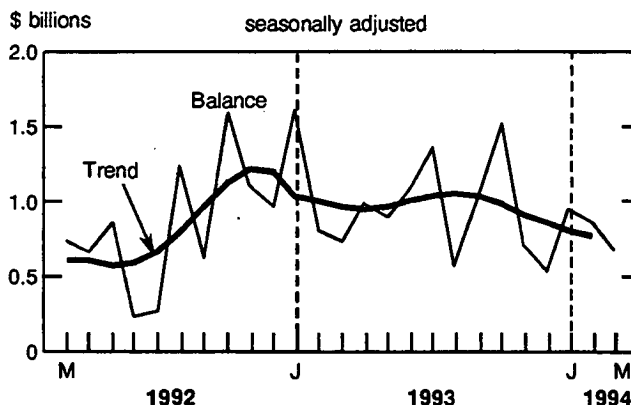
Merchandise trade

Balance of payments basis



Merchandise trade balance

Balance of payments basis



Growth in the trend for energy-product exports, accelerating since November, reached 2.0% in the most recent month. The trend for natural gas exports, increasing since October 1993, has given the greatest strength to the overall movement.

Trending upward for 10 months, exports of industrial goods grew by 1% in the latest period to stand 9% above their year-earlier level.

The trend for forestry products rose 0.7% in the latest period. Newsprint exports grew 2.3% in the latest three months, but still stood 8.1% below their year-earlier level. Although the trend for woodpulp has grown 11.2% since November 1993, it still remained below its year-earlier level.

Despite increases in the latest month's seasonally adjusted numbers, the export trend was negative for automotive products, agricultural and fishing products, and other consumer goods.

Automotive exports were down for the fourth consecutive month, reflecting plant retooling (earlier in the year) and delayed shipments. Trend levels for autos are expected to return to normal by next month. The trend for parts has been growing for eight months, and was up 21% from last year.

Within agricultural and fishing products, wheat exports have been falling at an increasing rate since October 1993.

Following 35 months of growth, exports of consumer goods have fallen in the latest two months. The rate of growth had been decelerating since August 1993.

Import trends

On a trend basis, imports have increased by over 30% in the latest 26 months to stand 13.0% higher than a year earlier. Imports from the United States have been up for 27 months, but their rate of growth has been slowing for the latest five months.

The import trend increased in the latest period for machinery and equipment, automotive products, industrial goods and materials, energy products, and agricultural and fishing products.

Industrial goods, trending upward for 2½ years, grew a further 1.1% in the latest month. Metals and ores, on the rise for 20 months, rose a further 2.1%. Imports of chemicals and plastics and of "other industrial goods", expanding for the past two years, were each up by 0.8% in the latest month.

Automotive imports have been trending upward since July of 1993, but the rate of increase began to decelerate some months ago, mostly because of trucks and auto parts.

Imports of energy products have been accelerating for the past three months. Although crude petroleum imports have been fairly flat in recent months, coal and related products have shown substantial growth, increasing by 10.2% in the most recent month.

The trend for agricultural products has been increasing for 2½ years. However, total growth in the past year has been only 6%.

Imports of consumer goods have been on a downswing since December, falling 0.4% in the latest month.

In the forestry products sector, the trend for crude wood products began to accelerate in December after three flat months, reaching 2.9% in the latest month.

Available on CANSIM: matrices 3620-3629, 3651, 3685-3713, 3718-3720 and 3887-3913.

Current-account data (which incorporate merchandise trade statistics, trade in services and capital account movements) are available quarterly in *Canada's balance of international payments* (67-001, \$30/\$120).

For further information on international trade statistics, *Preliminary statement of Canadian international trade* (65-001P, \$11/\$110) is now available. For more timely receipt of the data, a fax service is available on the morning of release. See "How to order publications".

For further information on statistics, concepts and definitions, the March 1994 issue of *Summary of Canadian international trade* (65-001, \$18.20/\$182) will be available the first week of June, or contact Gordon Blaney (613-951-9647), Client Services Section, International Trade Division.

New release format for international merchandise trade statistics

Beginning in June, *Preliminary statement of Canadian international trade* (65-001P) and *Summary of Canadian international trade* (65-001) will merge. The new merged publication, *Canadian international merchandise trade* (65-001), will be released each month in the week following The Daily's *Canadian merchandise trade release*. (The Daily's *Canadian merchandise trade release* will continue to appear according to the schedule published in December 1993.)

This merging of the two publications will increase focus on customs-basis data (with its enhanced level of detail), provide a single publication for merchandise trade data, and realize cost efficiencies by eliminating duplication.

Both The Daily and *Canadian international merchandise trade* will summarize highlights of the balance-of-payments-basis merchandise trade statistics—with exports, imports, and balance presented within the context of the latest current-account data. However, the emphasis in these releases, as in the other main products of the International Trade Division, will be the customs-basis information.

For further information on this new format, refer to "Note to users" in the February and March 1994 issues of *Preliminary statement of Canadian international trade* (65-001P) and *Summary of Canadian international trade* (65-001), or contact Client Services Section (613-951-9647, fax: 613-951-0117), International Trade Division.

Merchandise trade, balance of payments basis

	Exports				Imports			
	March 1994	February 1994	January 1994	March 1993	March 1994	February 1994	January 1994	March 1993
\$ millions								
seasonally adjusted								
United States	13,672	13,005	12,816	11,624	11,775	10,934	10,840	10,046
Other trading areas	2,988	2,409	2,855	2,958	4,227	3,632	3,893	3,821
Total	16,661	15,413	15,672	14,582	16,002	14,566	14,733	13,867
Agricultural and fishing products	1,383	1,084	1,232	1,181	989	923	926	886
Energy products	1,627	1,625	1,623	1,447	573	485	593	633
Forestry products	2,194	2,015	2,072	1,991	136	130	133	132
Industrial goods and materials	2,875	2,768	2,706	2,477	2,916	2,823	2,777	2,469
Machinery and equipment	3,631	3,403	3,340	2,787	5,150	4,709	4,580	4,334
Automotive products	4,146	3,798	3,950	4,069	3,935	3,338	3,541	3,334
Other consumer goods	466	436	443	376	1,900	1,777	1,766	1,720
Special transactions trade	380	314	340	297	459	396	388	328

Merchandise trade, monthly variation of the trend

	Exports				Imports			
	February 1994	January 1994	December 1993	February 1993	February 1994	January 1994	December 1993	February 1993
% change								
Agricultural and fishing products	-1.9	-1.8	-1.4	0.4	0.6	0.5	0.5	1.1
Energy products	2.0	1.7	1.1	1.2	1.8	1.6	0.8	4.5
Forestry products	0.7	1.0	1.8	0.7	-0.6	-0.7	-0.2	0.8
Industrial goods and materials	1.0	0.7	0.5	-0.6	1.1	1.3	1.4	1.3
Machinery and equipment	2.2	2.3	2.4	0.3	1.0	0.8	0.7	1.5
Automotive products	-1.2	-1.6	-1.6	2.9	0.9	0.8	1.2	1.9
Other consumer goods	-0.4	-0.1	0.7	1.1	-0.4	-0.4	-0.3	0.7
Special transactions trade	0.6	-0.1	-0.7	-0.6	2.4	2.4	1.8	-1.4

DATA AVAILABILITY ANNOUNCEMENTS

Export and import price indexes

March 1994

Current- and fixed-weighted export and import price indexes (1986=100) on a balance of payments basis are now available. Price indexes are listed from January 1986 to March 1994 for the five commodity sections and 62/61 major commodity groups.

Customs-based current- and fixed-weighted U.S. price indexes (1986=100) are also available. Price indexes are listed from January 1986 to March 1994. Included with the U.S. commodity indexes are the 10 all-countries and U.S.-only SITC section indexes.

Available on CANSIM: matrices 3620-3629.

The March 1994 issue of *Summary of Canadian international trade* (65-001, \$18.20/\$182) will be available the first week of June. See "How to order publications".

For further information on this release, contact Denis Pilon (613-951-4808), Price Index Unit, International Trade Division. ■

Steel primary forms

Week ending May 14, 1994 (preliminary)

Steel primary forms production for the week ending May 14, 1994, totalled 255 693 tonnes, down 2.2% from the week-earlier 261 443 tonnes and down 13.6% from the year-earlier 295 969 tonnes.

The cumulative total at the end of the week was 5 027 886 tonnes, a 5.5% decrease from 5 320 278 tonnes for the same period in 1993.

For further information on this release, contact Greg Milsom (613-951-9827), Industry Division. ■

Railway carloadings

Nine-day period ending April 30, 1994

The number of railway cars loaded in Canada during the nine-day period decreased by 1.9% from the year-earlier period; revenue-freight loaded decreased by 2.5% to 5.9 million tonnes.

Piggyback traffic tonnage, which is included in total carload traffic, increased by 9.0% during the same period.

Tonnage of revenue-freight loaded as of April 30, 1994, increased 1.7% from the previous year.

Cumulative data for 1993 and 1994 have been revised.

For further information on this release, contact Angus MacLean (613-951-2528, fax: 613-951-0579), Surface Transport Unit, Transportation Division. ■

Electric lamps

April 1994

Light bulb and tube manufacturers sold 22,295,000 light bulbs and tubes in April 1994, a 7.8% increase from 20,676,000 a year earlier.

Year-to-date sales at the end of April 1994 totalled 102,095,000 light bulbs and tubes, a 15.0% increase from 88,775,000 a year earlier.

The April 1994 issue of *Electric lamps* (43-009, \$6/\$60) will be available later.

For further information on this release, contact Laurie Vincent (613-951-3523), Industry Division. ■

Corrugated boxes and wrappers

April 1994

Domestic shipments of corrugated boxes and wrappers totalled 196 263 thousand square metres in April 1994, a 13.3% increase from 173 248 thousand square metres shipped a year earlier.

For January to April 1994, domestic shipments totalled 754 064 thousand square metres, a 10.1% increase from 684 999 thousand square metres shipped during the same period in 1993.

The April 1994 issue of *Corrugated boxes and wrappers* (36-004, \$6/\$60) will be available later.

For further information on this release, contact Sandra Bohatyretz (613-951-3531), Industry Division. ■

Restaurants, caterers and taverns

March 1994

Restaurant, caterer and tavern receipts totalled \$1,620 million for March 1994, an increase 8.4% from \$1,495 million in March 1994.

Available on CANSIM: matrix 52.

The March 1994 issue of *Restaurants, caterers and taverns* (63-011, \$7/\$70) will be available in three weeks. See "How to order publications"

For further information on this release, contact William Birbeck (613-951-3506), Services, Science and Technology Division. ■

Soft drinks

April 1994

Data on the production of soft drinks for April 1994 are now available.

Available on CANSIM: matrix 196.

Monthly production of soft drinks (32-001, \$3/\$30) will be available shortly.

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

Average prices of selected farm inputs

April 1994

Data for April 1994 on the average prices for selected farm inputs are now available by geographic region.

Available on CANSIM: matrices 550-582.

For further information on this release, contact the Information and Current Analysis Unit (613-951-9606), Prices Division. ■

Stocks of frozen poultry products

May 1, 1994

Preliminary data on the stocks of frozen poultry products in cold storage for May 1, 1994, as well as revised data for the January 1 to April 1, 1994 period, are now available.

Available on CANSIM: matrices 5675-5677.

For further information on this release, contact Jacqueline LeBlanc (613-951-8715), Livestock and Animal Products Section, Agriculture Division. ■



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PUBLICATIONS RELEASED

Canadian economic observer, May 1994.

Catalogue number 11-010

(Canada: \$22/\$220; United States: US\$26/US\$260;
other countries: US\$31/US\$310).

**Preliminary statement of Canadian international
trade, March 1994.**

Catalogue number 65-001P

(Canada: \$11/\$110; United States: US\$14/US\$140;
other countries: US\$16/US\$160).

The labour force, April 1994.

Catalogue number 71-001

(Canada: \$20/\$200; United States: US\$24/US\$240;
other countries: US\$28/US\$280).

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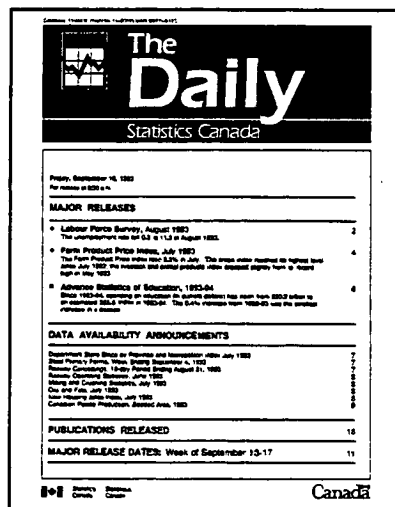
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