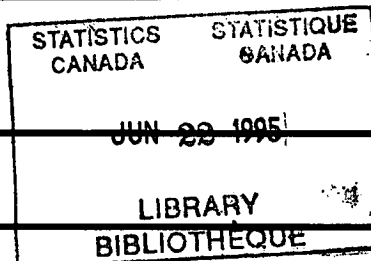




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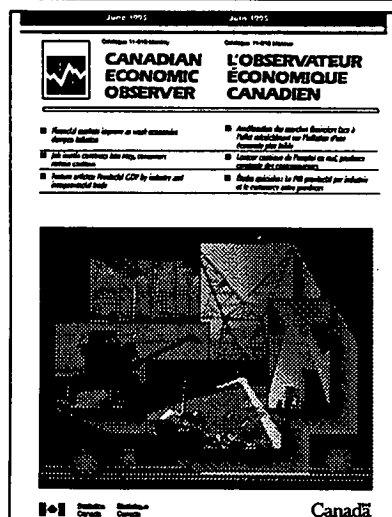
MAJOR RELEASES

- **Book publishing, 1993/94** 2
Canadian-controlled publishers have seen their book exports boom over the past four years. Domestic sales have remained flat, however, except in Quebec, where sales of books published by French-language firms have soared.

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Canadian economic observer June 1995

The June 1995 issue of *Canadian economic observer*, Statistics Canada's flagship publication for economic statistics, carries a monthly summary of current economic conditions and two feature articles: one analyzes provincial GDP by industry, the other interprovincial trade.

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 June 1995 issue of *Canadian economic observer* (11-010, \$22/\$220) is now available. See "How to order publications".

For further information on this release, contact Cynthia Boskie (613-951-3634), Current Analysis Group.



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MAJOR RELEASES

Book publishing

1993/94

Canadian-controlled publishers have seen their book exports boom over the past four years. Domestic sales have remained flat, however, except in Quebec, where sales of books published by French-language firms have soared.

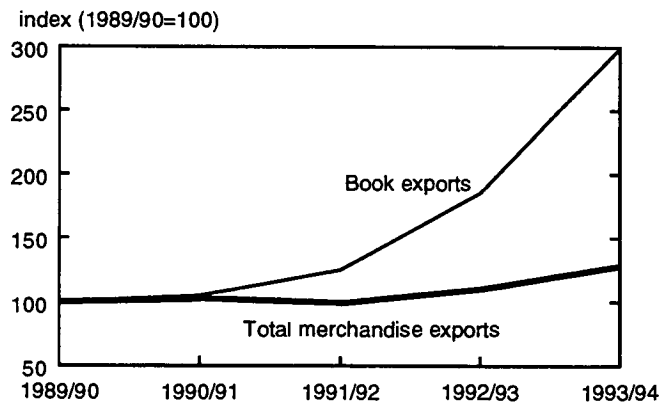
Exports of Canadian books tripled from \$38.6 million in 1989/90 to \$115.6 million in 1993/94. Domestic sales in 1993/94 hit \$1.3 billion, an increase of only 7.6% over the four-year period. Industry sources report most of the export growth occurred because of two factors: publishers have been seeking alternatives to the flat domestic market, and government exporting initiatives have begun to pay off.

Since 1988/89, the growth in book exports has been far stronger than that in total merchandise exports.

Domestic and export sales of books

	Domestic sales	Export sales
	\$ '000	
1989/90	1,204,440	38,611
1990/91	1,252,788	40,514
1991/92	1,246,101	48,332
1992/93	1,286,490	71,563
1993/94	1,296,945	115,565

Canadian book exports



Note to readers

The Book Publishers and Exclusive Agents Survey is a census of all book publishers and exclusive agents in Canada with annual revenues of \$50,000 or more. It is based on an annual survey of 316 publishers and 42 exclusive agents who provided data based on their financial years ending any time between April 1, 1993 and March 31, 1994.

A book publisher is a firm that selects and edits work, contracts with authors or copyright holders to produce it in print or other format, and then offers it for sale through any distribution channels while bearing the associated risks. Exclusive agents do not publish work; instead, acting as another firm's sole representative, they distribute and sell work published by that firm.

Domestic sales are sales of merchandise delivered to an address in Canada. Export sales are sales of merchandise that physically crossed the Canadian border to a foreign address. Other foreign sales are merchandise made and sold outside Canada from a foreign base of a Canadian-controlled company (that is, the merchandise never crossed the Canadian border).

The book export boom occurred among publishers in all regions of the country, but it was especially strong in Quebec. Exports and the other foreign sales of Quebec-controlled firms rose from \$9.3 million in 1989/90 to \$76.1 million in 1993/94.

Only in Quebec did sales of books published in Canada increase substantially: over the past four years, book sales in Quebec have risen 29%. Books published by French-language firms have risen by a third.

Textbooks and trade paperbacks remain the most significant categories of net sales for Canadian publishers and exclusive agents: their combined sales totalled \$671 million in 1993/94. In recent years, growth has been strongest for trade hardcover, scholarly, professional and technical books; growth has been weakest for reference books.

Overall, Canadian companies published 9,764 new titles in 1993/94, a 7.8% increase from the previous year, and a 16.3% increase from five years earlier.

Net sales in Canada, by the commercial category of the title

	1989/90	1993/94	1989/90 to 1993/94
	\$ '000		% change
Elementary and high school textbooks	237,190	230,431	-2.8
Postsecondary textbooks	148,295	164,002	10.6
Mass-market paperbacks	123,384	135,882	10.1
Trade paperbacks	251,032	276,984	10.3
Trade hardcovers	146,610	192,213	31.1
Scholarly	6,573	8,637	31.4
Reference	173,667	150,269	-13.5
Professional and technical	117,689	138,527	17.7
Total	1,204,440	1,296,945	7.7

Government support for publishers has levelled off

Government financial aid to publishers levelled off in 1993/94 after climbing sharply over the three previous years. The average government grant (including both provincial and federal funds) to publishers was \$172,000 in 1993/94, unchanged from the year before. Those levels represented a 58% increase from the average grant of \$109,000 in 1989/90. About two-thirds of all publishing companies received financial aid, a level that has remained relatively constant for the past four years.

Overall, governments provided grants totalling \$37.5 million to Canadian publishers in 1993/94, compared with \$22.2 million four years earlier.

Full-time employment in the book publishing industry has declined steadily. In 1993/94, the industry employed 6,862 full-time employees, down 1.8% from the previous year and down 8.4% from about 7,500 in 1989/90.

Before-tax profits were \$83.8 million in 1993/94, a 15% rise from the previous year. Personnel expenses have risen nearly 17% since 1989/90, reaching \$278 million in 1993/94, due primarily to higher pay for full-time workers and more contract work.

Bookstore chains buying more books as libraries cut back

The customer base of Canadian publishers has changed drastically over the past four years, especially for French-language publications. For example, public libraries are buying fewer books, while sales are expanding to bookstore chains and book clubs.

Bookstore chains, the biggest customer, bought almost \$130 million worth of English-language publications in 1993/94, a 20% increase over the previous four years; the chains bought \$100 million in French-language publications, double the level from 1989/90.

Elementary and secondary schools are still the second largest client of Canadian publishers, even though they have drastically cut back purchases. In 1993/94, schools bought about \$123 million worth of English publications, down 15% since 1989/90, and \$39 million worth of French publications, down only 3%.

Since 1989/90, sales of French publications to public libraries have dropped 35%, while sales of English books have fallen 22%. Government and special libraries spent 32% less on French books, but 27% more on English books.

Book publishing (87-210) has been discontinued. Selected details from the Survey of Book Publishers and Exclusive Agents are available in table format (\$50). A summary of the data will also appear this fall in a new publication, *Culture in Canada: A statistical perspective* (87-211, \$30).

Data from this survey broken down by province are now available. Custom tabulations are also available on a cost-recovery basis.

For further information on this release, or to order tables, contact Pina La Novara (613-951-1573, fax: 613-951-9040), Culture Statistics Program, Education, Culture and Tourism Division. ■

OTHER RELEASES

Production and disposition of tobacco products

May 1995

Canadian manufacturers made 4.45 billion cigarettes in May, a slight increase (+0.2%) from 4.44 billion in May 1994. Total shipments in May reached 4.75 billion cigarettes, 5.1% more than in May 1994.

Domestic shipments, which are 87% of total shipments, dropped slightly (-1.1%). Exports were almost double the May 1994 level. New markets in a number of countries other than the United States have been largely responsible for the export growth in recent months.

Production levels were close to shipment levels, so inventories stayed high at 6.64 billion cigarettes, well above last year's level.

Data on domestic shipments are an aggregate of shipments reported by Canadian manufacturers, and are not data on retail sales or final consumption. Data on cigarette consumption are available from the quarterly Survey on Smoking in Canada. For further information on that quarterly survey, contact Lecily Hunter (613-951-0597), Special Surveys Division.

Available on CANSIM: matrix 46.

The May 1995 issue of *Production and disposition of tobacco products* (32-022, \$6/\$60) will be available shortly. See "How to order publications".

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

Mineral wool including fibrous glass insulation

May 1995

Manufacturers shipped 1 139 945 square metres of R12 factor (RSI 2.1) mineral wool batts in May, down 50.2% from 2 289 236 square metres a year earlier and down 15.9% from 1 354 732 square metres the previous month.

Year-to-date shipments to the end of May 1995 totalled 11 176 425 square metres, a 17.6% decrease from the same period in 1994.

Available on CANSIM: matrices 40 and 122 (series 32 and 33).

The May 1995 issue of *Mineral wool including fibrous glass insulation* (44-004, \$6/\$60) will be available shortly. See "How to order publications".

For further information on this release, contact Roland Joubert (613-951-3527), Industry Division. ■

Steel primary forms

Week ending June 17, 1995 (preliminary)

Steel primary forms production for the week ending June 17, 1995 totalled 294 543 tonnes, down 0.04% from 294 661 tonnes a week earlier, but up 6.0% from 277 769 tonnes a year earlier.

The year-to-date total at the end of the week was 6 849 957 tonnes, an 8.1% increase from 6 336 634 tonnes for the same period in 1994.

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

PUBLICATIONS RELEASED

Canadian economic observer, June 1995

Catalogue number 11-010

(Canada: \$22/\$220; United States: US\$27/US\$264; other countries: US\$31/US\$308).

Production, shipments and stocks on hand of sawmills east of the Rockies, April 1995

Catalogue number 35-002

(Canada: \$11/\$110; United States: US\$14/US\$132; other countries: US\$16/US\$154).

Electric lamps, May 1995

Catalogue number 43-009

(Canada: \$6/\$60; United States: US\$8/US\$72; other countries: US\$9/US\$84).

Department store sales and stocks, February 1995

Catalogue number 63-002

(Canada: \$16/\$160; United States: US\$20/US\$192; other countries: US\$23/US\$224).

The labour force, May 1995

Catalogue number 71-001

(Canada: \$23/\$230; United States: US\$28/US\$276; other countries: US\$33/US\$322).

The paper used in this publication meets the minimum requirements of American National Standard for Information Sciences - Permanence of Paper for Printed Library Materials, ANSI Z39.48 - 1984.



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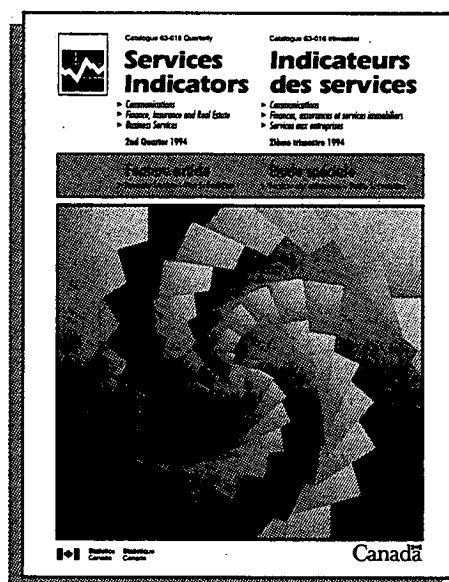
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