

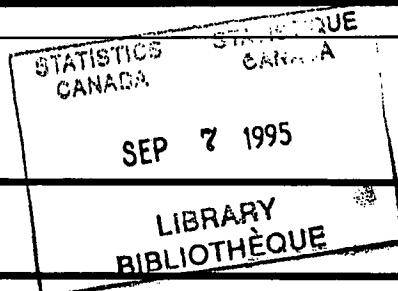


# The Daily

Statistics Canada

Thursday, September 7, 1995

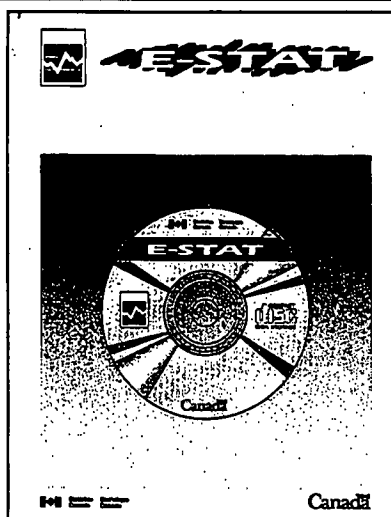
For release at 8:30 a.m.



## MAJOR RELEASES

- **Industrial capacity utilization rates, second quarter 1995** 3  
A steep decline in exports and dampened consumer spending forced industries to reduce their capacity use by 1.5 percentage points to 83.3% in the second quarter of 1995. The last decrease of this magnitude occurred in the first quarter of 1991.
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Wages and salaries grew only 0.2% in the second quarter of 1995, slowing from the 0.6% growth recorded in first quarter.
- **Stocks of grain, July 31, 1995** 9  
Higher grain exports, lower production, and record livestock numbers contributed to an overall decline in the volume of grain left on farms at July 31, the end of the 1994/95 crop year.

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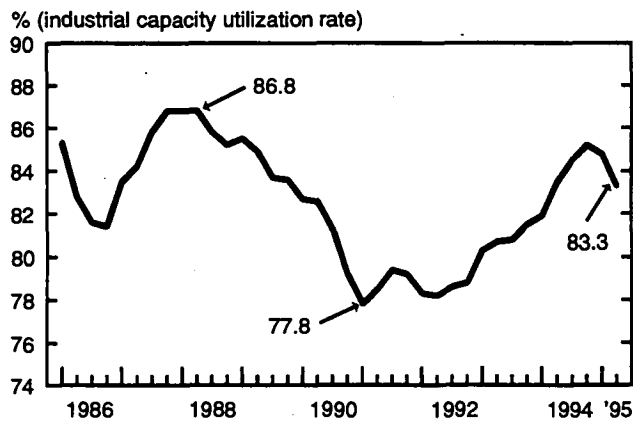
## MAJOR RELEASES

### Industrial capacity utilization rates

Second quarter 1995

A steep decline in exports and dampened consumer spending forced industries to reduce their capacity use by 1.5 percentage points to 83.3% in the second quarter of 1995. The last decrease of this magnitude occurred in the first quarter of 1991. Declining rates of capacity use signal easing price pressures for wholesalers and consumers.

Downturn in capacity use



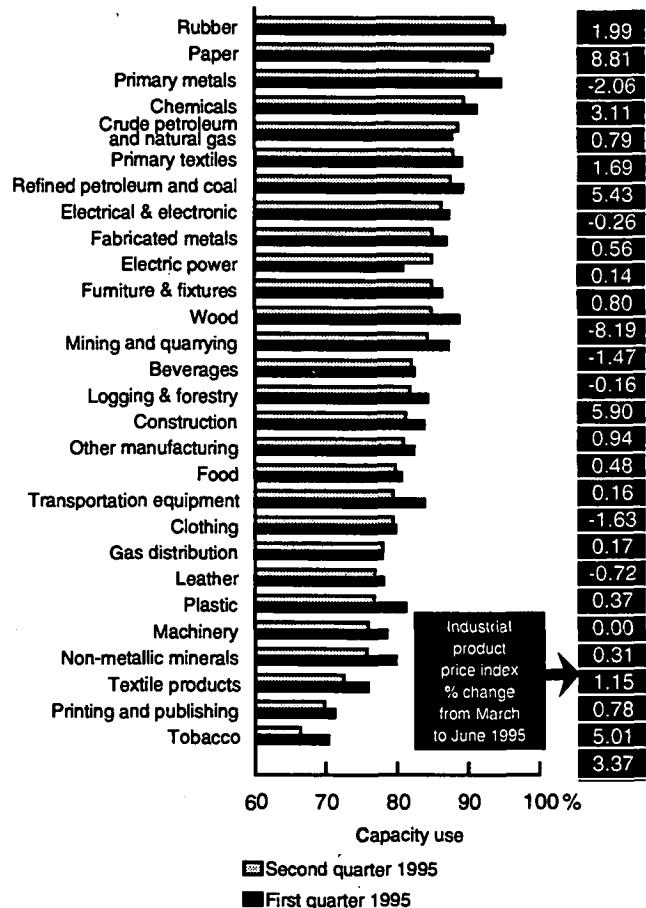
In July, industrial and raw material prices edged down 0.1% and 1.5% respectively from their June levels, while the consumer price index declined for a second consecutive month. Modest growth in wages and unit labour costs provided additional evidence that price pressures are in check.

Companies remain committed to expanding capacity and improving efficiency by using computerized technology. In 1995, businesses plan to spend \$23.1 billion on machinery and equipment, a 21.9% increase over 1994. This investment, together with no shortages of either raw materials or skilled labour, seems to suggest that the conditions for a non-inflationary economic environment are in place.

#### Note to readers

An industry's capacity use is the ratio of its actual output to its estimated potential output. Statistics Canada derives estimates of an industry's potential output from measures of its capital stock. In addition, since 1987 Statistics Canada has been surveying companies for their estimates of annual capacity use, in order to produce survey-based industry measures. A company's measure of its level of operation, as a percentage of potential, takes into account changes in the obsolescence of facilities, capital-to-labour ratios and other characteristics of production techniques. The surveyed rates anchor the calculated quarterly series and ensure they reflect such changes.

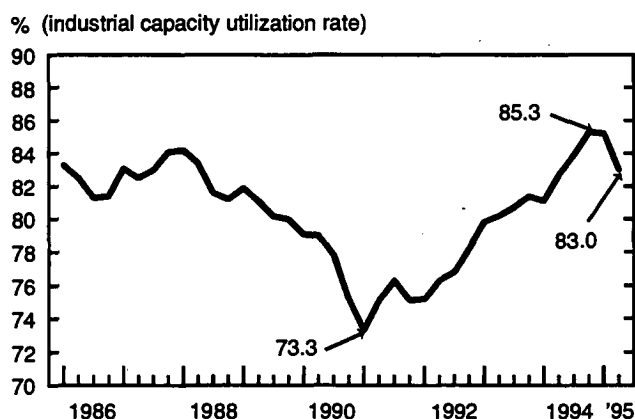
Increases in industrial prices stalled



## Widespread decreases in manufacturing

Manufacturers reduced their use of capacity to 83.0% in the second quarter, down 2.2 percentage points from the first quarter. All but 1 of the 22 manufacturing industries reduced their levels of capacity use.

### Big drop in manufacturing



Slower growth in the U.S. economy was an important factor underlying the drop in manufacturers' use of capacity. Many export-oriented industries (such as transportation equipment, primary metals, electrical and electronic goods, and wood) posted significant declines.

Reflecting these lower rates of capacity use, many manufacturing industries registered either reductions or

only marginal increases in their product prices during the second quarter.

The only industry that boosted capacity use was the paper industry, which was operating at a level not seen since the 1987-88 economic expansion. Accompanying this high use of capacity was a product price increase of 9%, the largest for any industry in the second quarter. In 1995 the paper industry plans to spend more than \$4 billion on new plant and equipment, almost twice the 1994 level.

### Mixed pattern in non-manufacturing

The construction industry led the declines in the non-manufacturing sector. The use of capacity in construction decreased 2.6 percentage points to 81.2%. This was mainly due to the weak residential market, where lower mortgage rates have not yet translated into more home-building.

Forestry registered a drop of 2.5 percentage points to 81.8%, reflecting the sluggish housing market throughout North America. In mines and quarries, reduced activity in drilling contributed to a 3.0 percentage point drop to 84.2%.

Electric power systems increased capacity use by 4.0 percentage points to 84.9%.

**Available on CANSIM: matrix 3140.**

For further information on this release, contact Susanna Wood (613-951-0655) or Richard Landry (613-951-2579), Investment and Capital Stock Division. □

## Industrial capacity utilization rates

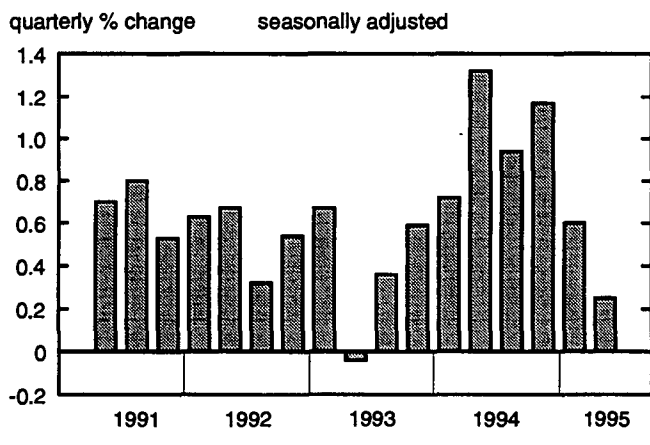
	Second quarter 1994	First quarter 1995	Second quarter 1995	Second quarter 1994 to Second quarter 1995	First quarter 1995 to Second quarter 1995
	percentage point change				
<b>Total non-farm goods-producing industries</b>	<b>83.5</b>	<b>84.8</b>	<b>83.3</b>	<b>-0.2</b>	<b>-1.5</b>
Logging and forestry	85.9	84.3	81.8	-4.1	-2.5
Mining (including milling), quarrying and oil wells	86.3	87.6	86.9	0.6	-0.7
Mining (including milling) and quarrying	85.5	87.2	84.2	-1.3	-3.0
Crude petroleum and natural gas	86.8	87.8	88.6	1.8	0.8
Manufacturing	82.7	85.2	83.0	0.3	-2.2
Durable goods	82.0	86.1	83.2	1.2	-2.9
Wood	92.7	88.7	84.8	-7.9	-3.9
Furniture and fixture	78.8	86.3	84.9	6.1	-1.4
Primary metal	89.5	94.7	91.4	1.9	-3.3
Fabricated metal products	80.1	87.0	85.0	4.9	-2.0
Machinery	75.6	78.5	76.0	0.4	-2.5
Transportation equipment	79.6	83.8	79.4	-0.2	-4.4
Electrical and electronic products	81.6	87.3	86.2	4.6	-1.1
Non-metallic mineral products	75.9	79.8	75.7	-0.2	-4.1
Other manufacturing	80.2	82.4	80.9	0.7	-1.5
Non-durable goods	83.7	84.1	82.9	-0.8	-1.2
Food	81.2	80.6	79.8	-1.4	-0.8
Beverage	81.9	82.4	82.0	0.1	-0.4
Tobacco products	76.1	70.4	66.4	-9.7	-4.0
Rubber products	92.4	95.2	93.6	1.2	-1.6
Plastic products	82.7	81.2	76.8	-5.9	-4.4
Leather and allied products	75.4	78.1	76.9	1.5	-1.2
Primary textile	87.2	89.1	87.9	0.7	-1.2
Textile products	76.5	75.9	72.5	-4.0	-3.4
Clothing	80.5	79.8	79.4	-1.1	-0.4
Paper and allied products	90.6	93.0	93.5	2.9	0.5
Printing, publishing and allied industries	76.0	71.2	69.8	-6.2	-1.4
Refined petroleum and coal products	86.4	89.3	87.5	1.1	-1.8
Chemical and chemical products	87.1	91.3	89.4	2.3	-1.9
Construction	83.2	83.8	81.2	-2.0	-2.6
Electric power and gas distribution systems	84.1	80.5	83.9	-0.2	3.4
Electric power	85.1	80.9	84.9	-0.2	4.0
Gas distribution	78.0	77.9	78.0	0.0	0.1

## Estimates of labour income

Second quarter 1995 and June 1995

Wages and salaries grew only 0.2% in the second quarter of 1995, slowing from 0.6% growth in first quarter. This latest slowdown was the lowest quarterly growth rate since 1993. Employers' contributions to supplementary labour income grew 0.8%, resulting in overall weak growth in labour income (+0.2%) in the second quarter.

Labour income



Reflecting the overall pause in economic activity, wages and salaries declined in half of the 18 industry groups in the second quarter, compared with only 5 industries in the first quarter. As well, gross domestic product declined in the second quarter.

In contrast with 1994, growth in wages and salaries fluctuated during the first six months of 1995. Slight declines in January, March and April constrained the average monthly growth rate in 1995 to 0.1%. Despite the weak growth over the first half of the year, wages and salaries have still remained 3.1% higher than last year.

Employers have added few new workers to their payrolls this year, contributing to the weak growth in wages and salaries. Average weekly earnings for all industries declined slightly in the second quarter, returning to the level posted in the fourth quarter of 1994. Also, average weekly hours for workers paid by the hour fell for a second quarter in a row.

### Growth in manufacturers' payrolls has been slow this year

Manufacturers did not increase payrolls in the second quarter of 1995 after increasing wages and

#### Note to readers

Labour income consists of wages and salaries (87%), plus supplementary labour income (13%). Wages and salaries include items such as bonuses, gratuities, taxable allowances and retroactive wage payments. Supplementary labour income is employer contributions to employee welfare, pension, workers' compensation and unemployment insurance plans. Labour income accounts for 57% of gross domestic product.

salaries by 0.5% in the first quarter. The second quarter's slowdown brought manufacturing's total payroll so far this year to \$32.5 billion. Although still 4.5% above the 1994 level, the growth in wages and salaries slowed considerably during the first six months of 1995 (from a 6.7% year-over-year increase in January to just a 2.8% year-over-year increase in June). Less demand for manufactured goods, especially motor vehicles, combined with earlier plant shutdowns for retooling, greatly contributed to the weakness in wages and salaries in manufacturing during the second quarter.

### Mixed wage and salary growth in other goods-producing industries

The pay of logging and forestry workers declined substantially in the second quarter (-4.5%). Wages and salaries in logging and forestry have been decelerating since the peak reached in the third quarter of 1994, when wages and salaries grew 6.3%. Businesses in the logging and forestry industry lost workers in the second quarter, and the average weekly earnings of logging and forestry workers fell again. Businesses may be responding to lower demand for lumber, as residential construction remains weak in both Canada and the United States.

Wages and salaries in mining remained little changed in the second quarter, advancing 1.8% compared with 1.1% in the first quarter. Mining companies in Ontario, Quebec, Saskatchewan and British Columbia largely contributed to the growth.

Wages and salaries of employees in construction grew 2.4%, mostly due to a moderate increase in average weekly earnings, offsetting the 2.3% decline in the first quarter.

### Most services industries posted growth in wages and salaries

Except for finance, insurance and real estate, all services industries posted growth in wages and salaries in the second quarter of 1995. The commercial services industry led the growth in wages and salaries

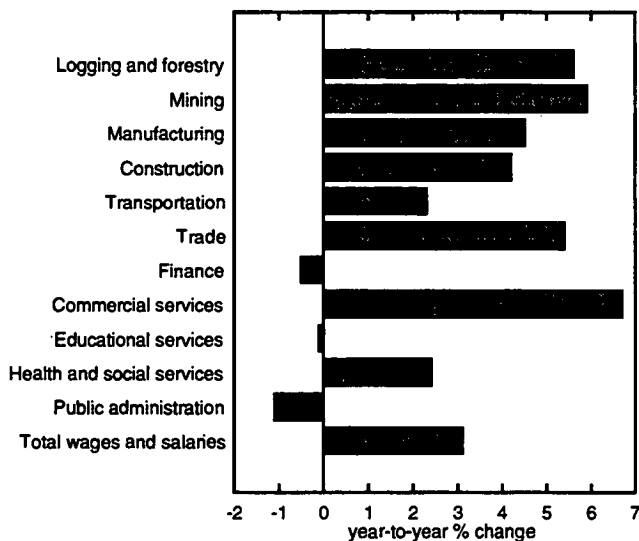
(+2.0%), followed by trade (+1.1%) and transportation, communications and utilities (+0.6%).

Wages and salaries in finance, insurance and real estate declined 2.5% in the second quarter after posting two quarterly increases. The decline returned this industry to the downward trend set in 1994. Reductions in employment and fewer hours for workers paid by the hour, especially in the real estate industry, contributed significantly to the second quarter decline. So far this year, this industry has paid out less in wages and salaries than during the first half of 1994.

### Wages and salaries declined in public administration, health and welfare

All government levels posted declines in wages and salaries in the second quarter, led by federal (-3.4%), local (-1.1%) and provincial (-0.5%) administration. Reductions in employment contributed most to these declines, as governments continued to downsize in an effort to reduce deficits. Wages and salaries in education remained flat in the second quarter, while wages and salaries in health and social services industries decreased 0.6%.

**Many Industries have posted moderate growth in wages and salaries this year**



### Wage and salary growth continued in the West

In the second quarter, each of the Western provinces posted wage and salary growth rates that

were similar or higher than in the first quarter. British Columbia led the Western provinces with the strongest growth (+2.4%), followed by Manitoba (+1.9%). Saskatchewan posted wage and salary growth of 1.0%, slightly less than in the first quarter (+1.4%). Alberta posted a growth rate of 0.6%, similar to the first quarter.

In Central Canada, both Ontario and Quebec posted weaker second quarter growth in wages and salaries, as both average weekly earnings and average weekly hours declined. Wages and salaries declined 0.9% in Ontario. (The last decline in Ontario was in 1993.) Similarly, in Quebec, wage and salary growth slowed to 0.3%, from first quarter growth of 0.9%. Wages and salaries of employees in government, health, social services, and education account for almost 30% of payrolls in both Quebec and Ontario. Wage and salary growth in these industries either slowed considerably or declined in these two provinces in the second quarter.

Except for Prince Edward Island and Nova Scotia, most Eastern provinces posted lower wages and salaries in the second quarter. Wages and salaries in Prince Edward Island increased 7.5% in the quarter, continuing the turnaround that began in the first quarter. Several businesses have benefited from the building of the bridge from the mainland. In fact, employers on the Island paid \$40 million more in wages and salaries in the first half of this year than they did in the first half of 1994.

### June 1995

Wages and salaries grew 0.8% to \$30.4 billion in June, the strongest monthly growth since June 1994. Although wages and salaries in public administration continued to decline in June, many industries posted wage and salary growth of 1.0% or more. The strongest increases were in logging and forestry (+4.4%), commercial services (+2.2%), finance, insurance and real estate (+1.7%), trade (+1.6%), construction (+1.4%) and education (+1.3%). Employer contributions to supplementary labour income increased 1.8% in June, partly due to an increase in the Quebec payroll tax. Consequently, labour income grew 0.9% in June.

**Available on CANSIM: matrices 1791-1792.**

For further information on this release, contact Jean Lambert (613-951-4090, fax: 613-951-4087), Labour Division. □

# Wages, salaries and supplementary labour income

	June 1994	May 1995 <sup>r</sup>	June 1995 <sup>p</sup>	May 1995 to June 1995
seasonally adjusted				
	\$ millions			% change
Agriculture, fishing and trapping	249.6	258.4	253.3	-2.0
Logging and forestry	234.3	235.9	246.3	4.4
Mining, quarrying and oil wells	604.4	627.8	630.0	0.4
Manufacturing	5,320.6	5,451.5	5,464.6	0.2
Construction	1,658.0	1,676.9	1,699.9	1.4
Transportation, storage, communications and other utilities	2,807.9	2,844.3	2,850.0	0.2
Trade	4,175.1	4,323.2	4,394.5	1.6
Finance, insurance and real estate	2,516.0	2,457.9	2,499.9	1.7
Commercial and personal services	4,191.8	4,320.1	4,412.1	2.1
Educational and related services	2,829.4	2,768.4	2,803.1	1.3
Health and social services	2,756.1	2,809.1	2,812.7	0.1
Federal administration and other government ser- vices	988.7	962.9	952.0	-1.1
Provincial administration	736.0	729.1	724.4	-0.6
Local administration	701.8	696.9	694.6	-0.3
<b>Total wages and salaries</b>	<b>29,679.1</b>	<b>30,198.3</b>	<b>30,445.9</b>	<b>0.8</b>
Supplementary labour income	4,333.1	4,441.4	4,519.7	1.8
<b>Labour income</b>	<b>34,012.2</b>	<b>34,639.7</b>	<b>34,965.6</b>	<b>0.9</b>
	June 1994	May 1995 <sup>r</sup>	June 1995 <sup>p</sup>	June 1994 to June 1995
unadjusted				
	\$ millions			% change
Agriculture, fishing and trapping	296.5	248.6	300.8	1.5
Logging and forestry	271.6	221.3	285.7	5.2
Mining, quarrying and oil wells	630.9	630.1	658.0	4.3
Manufacturing	5,558.9	5,453.9	5,712.5	2.8
Construction	1,806.0	1,696.8	1,860.1	3.0
Transportation, storage, communications and other utilities	2,868.5	2,827.8	2,911.3	1.5
Trade	4,273.0	4,354.6	4,511.2	5.6
Finance, insurance and real estate	2,563.5	2,465.2	2,554.5	-0.4
Commercial and personal services	4,300.3	4,319.9	4,565.7	6.2
Educational and related services	2,965.4	2,874.2	2,960.4	-0.2
Health and social services	2,816.2	2,826.9	2,870.5	1.9
Federal administration and other government ser- vices	1,009.9	975.4	972.0	-3.8
Provincial administration	765.9	728.8	753.9	-1.6
Local administration	722.8	697.3	715.1	-1.1
<b>Total wages and salaries</b>	<b>30,849.3</b>	<b>30,320.9</b>	<b>31,631.5</b>	<b>2.5</b>
Supplementary labour income	4,489.2	4,471.6	4,684.5	4.4
<b>Labour income</b>	<b>35,338.5</b>	<b>34,792.5</b>	<b>36,315.9</b>	<b>2.8</b>

<sup>p</sup> Preliminary figures.

<sup>r</sup> Revised figures.



## Stocks of grain July 31, 1995

Higher grain exports, lower production, and record livestock numbers contributed to an overall decline in the volume of grain left on farms at July 31, the end of the 1994/95 crop year.

### Wheat stocks have dropped to very low levels

Stocks of wheat (excluding durum) in farmers' grain bins fell to 545 000 tonnes, the lowest level since the 1989/90 crop year. This decrease was due mainly to a 23% drop in production. Wheat exports rose 2% this crop year. Iran, Japan and the People's Republic of China have been the largest buyers.

### Barley is in short supply

Stocks of barley on farms dropped to 1.1 million tonnes, also the lowest level since 1989/90. The decline in stocks was due to a 10% decline in production compared with the 1993/94 crop year, and to increased use of barley as livestock feed. At July 1, 1995, the livestock inventory reported a 6% increase in the number of cattle and calves and a 3% increase in the number of hogs compared with last year (see *The Daily*, August 31, 1995).

Despite buoyant demand for barley from international markets, short supplies led to a 21% drop in exports.

### Stocks of durum wheat are at a record low

Stocks of durum wheat reached a record low of 100 000 tonnes. Strong international demand triggered a 39% increase in exports compared with last year.

### Canola marketings keeping up with record production

Strong increases in canola production (+31%) and marketings (+26%) during the crop year left stocks at

190 000 tonnes, up 145 000 tonnes from last year. Exports increased by 12%.

### Export demand has kept flaxseed stocks low

Exports of flaxseed grew 28% from last year, leaving only 30 000 tonnes on farms at the end of the crop year. The principal market for flaxseed is Europe, where it is processed into oil.

### Stocks of grain at July 31

Crop	1994	1995	1994 to 1995
			% change
	'000 tonnes		
Barley	2 000	1 055	-47.3
Oats	755	585	-22.5
Corn for grain	650	560	-13.8
Wheat excluding durum	3 360	545	-83.8
Canola	45	190	322.2
Durum wheat	445	100	-77.5
Flaxseed	45	30	-33.3
Rye	40	30	-25.0
Soybeans	12	8	-33.3

### Available on CANSIM: matrix 5628.

*Field crop reporting series no. 6: Stocks of Canadian grain at July 31, 1995 (22-002, \$15/\$85) is now available. See "How to order publications".*

For further information on this release, contact Tony Dupuis (613-951-0572) or Dave Burroughs (613-951-5138), Crops Section, Agriculture Division. ■

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## OTHER RELEASES

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### Profile of persons with disabilities

This bilingual profile provides an overview of the characteristics of persons with disabilities. It includes data for Canada, the provinces and territories. The profile covers such variables as nature and severity of disability, industry and occupation, level of schooling, field of study, and labour force participation.

Prepared by the Employment Equity Data Program, *Profile of persons with disabilities (limited at work/perception)* is available in print format (89F0038XPB, Canada, \$40; U.S. and other countries, US\$40) or in an electronic format that uses XV software (89F0038XDB, Canada, \$50; United States and other countries, US\$50). See "How to order publications".

For further information on this release, contact Patricia Greenhalgh (613-951-2107), Housing, Family and Social Statistics Division. ■

### Steel primary forms

Week ending September 2, 1995 (preliminary)

Steel primary forms production for the week ending September 2, 1995, totalled 260 823 tonnes, down 1.3% from 264 278 tonnes a week earlier, but up 6.8% from 244 190 tonnes a year earlier.

The year-to-date total at the end of the week was 9 875 636 tonnes, a 7.4% increase from 9 195 681 tonnes for the same period in 1994.

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

### Specified domestic electrical appliances

July 1995

Electrical appliance manufacturers shipped 44,592 kitchen appliances in July 1995.

Year-to-date shipments of kitchen appliances at the end of July 1995 amounted to 230,500 units.

The July 1995 issue of *Specified domestic electrical appliances* (43-003, \$6/\$60) will be available shortly. See "How to order publications".

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

### Electric utility construction price indexes

1994 (revised) and First half 1995 (preliminary)

Revised data for 1994 and preliminary data for the first half of 1995 are now available for the electric utility construction price indexes (1986=100).

Available on CANSIM: matrix 2022.

The second quarter issue of *Construction price statistics* (62-007, \$23/\$76) will be available in September. See "How to order publications".

For further information on this release, contact Paul-Roméo Danis (613-951-3350, fax: 613-951-2848), Client Services Unit, Prices Division. ■

### Federal government finance—correction

1994/95 (revised) and 1995/96 (estimates)

The "Federal government revenue and expenditure" table that appeared on page 4 of this release in yesterday's issue of *The Daily* contained some incorrect percentage totals for the three columns labelled "% of total revenue". Each of those three columns should have totalled to 100%.

For further information on this release, contact Robert Loggie (613-951-1809), or Paul Blouin (613-951-8563), Public Institutions Division. ■

## PUBLICATIONS RELEASED

**Field crop reporting series no. 6: Stocks of Canadian grain at July 31, 1995.** Vol. 74, no. 6.

**Catalogue number 22-002**

(Canada: \$15/\$85; United States: US\$18/US\$102; other countries: US\$21/US\$119).

**Retail trade, June 1995**

**Catalogue number 63-005**

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

**Exports by commodity, June 1995, microfiche version**

**Catalogue number 65-0040XMB**

(Canada: \$35/\$350; United States: US\$42/US\$420; other countries: US\$49/US\$490).

**Exports by commodity, June 1995, paper version**

**Catalogue number 65-0040XPB**

(Canada: \$75/\$750; United States: US\$90/US\$900; other countries: US\$105/US\$1,050).

**Labour force information, for the week ended August 19, 1995**

**Catalogue number 71-001P**

(Canada: \$10/\$100; United States: US\$12/US\$120; other countries: US\$14/US\$140).

**7:00 a.m. on Friday, September 8**

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*The Daily*, September 7, 1995

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H2Z 1X4

Local calls: (514) 283-5725  
Toll free: 1-800-361-2831  
Fax: 1-514-283-9350

**National Capital Region**

Statistical Reference Centre (NCR)  
Statistics Canada  
Lobby, R.H. Coats Building  
Holland Avenue  
Tunney's Pasture  
Ottawa, Ontario  
K1A 0T6

If outside the local calling area,  
please dial the toll free number for  
your province.

Local calls: (613) 951-8116  
Fax: 1-613-951-0581

**Ontario**

Advisory Services  
Statistics Canada  
10<sup>th</sup> Floor  
Arthur Meighen Building  
25 St. Clair Avenue East  
Toronto, Ontario  
M4T 1M4

Local calls: (416) 973-6586  
Toll free: 1-800-263-1136  
Fax: 1-416-973-7475

**Manitoba**

Advisory Services  
Statistics Canada  
Suite 300, MacDonald Building  
344 Edmonton Street  
Winnipeg, Manitoba  
R3B 3L9

Local calls: (204) 983-4020  
Toll free: 1-800-661-7828  
Fax: 1-204-983-7543

**Saskatchewan**

Advisory Services  
Statistics Canada  
Avord Tower, 9th Floor  
2002 Victoria Avenue  
Regina, Saskatchewan  
S4P 0R7

Local calls: (306) 780-5405  
Toll free: 1-800-667-7164  
Fax: 1-306-780-5403

**Southern Alberta**

Advisory Services  
Statistics Canada  
First Street Plaza, Room 401  
138-4<sup>th</sup> Avenue Southeast  
Calgary, Alberta  
T2G 4Z6

Local calls: (403) 292-6717  
Toll free: 1-800-882-5616  
Fax: 1-403-292-4958

**Alberta and the Northwest Territories**

Advisory Services  
Statistics Canada  
8<sup>th</sup> Floor, Park Square  
10001 Bellamy Hill  
Edmonton, Alberta  
T5J 3B6

Local calls: (403) 495-3027  
Toll free: 1-800-563-7828  
Fax: 1-403-495-5318

**British Columbia and the Yukon**

Advisory Services  
Statistics Canada  
Library Square Tower, Suite 600  
300 West Georgia Street  
Vancouver, B.C.  
V6B 6C7

Local calls: (604) 666-3691  
Toll free: 1-800-663-1551  
Fax: 1-604-666-4863

**Telecommunications Device for the Hearing Impaired**

Toll free: 1-800-363-7629