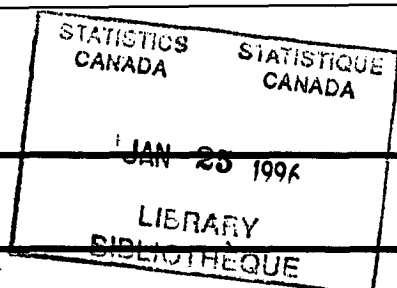


The Daily

Statistics Canada

Friday, January 26, 1996

For release at 8:30 a.m.



MAJOR RELEASES

- **Department store sales and stocks, December 1995 and 1995**

Although December sales did not meet retailers' hopes, sales did rise slightly compared with November. Overall department store sales have been on an upward trend since mid-1993. In 1995, sales increased 4.7%.

2
- **Industrial product price index, 1995 and December 1995**

Industrial producers charged 8.1% more for goods as they came out of the factory in 1995. It was the steepest increase since 1981. Soaring costs of pulp and paper led the way.

4
- **Raw materials price index, 1995 and December 1995**

Manufacturers paid 8.5% more for raw materials in 1995 than in 1994. It was the third year in a row where the annual average increased substantially. Most of the increase came from higher prices for metals, crude oil, vegetable products and wood.

8

OTHER RELEASES

Electric power selling price indexes, September to December 1995	11
Annual survey of manufactures, 1994	11

PUBLICATIONS RELEASED	12
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RELEASE DATES: January 29 to February 2	13
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MAJOR RELEASES

Department store sales and stocks

December 1995 and 1995 (annual)

Although December sales did not meet retailers' hopes, sales did rise a marginal 0.5% from November. Inventories decreased for a third consecutive month, down 0.6% from November.

Cash registers rang louder in December at the discount stores, where sales totalled \$1.2 billion (unadjusted), up 7.1% from December 1994. The majors rang in sales of \$1.1 billion, down 0.4% from a year earlier.

Department store sales

	Nov. 1995 ^r	Dec. 1995 ^p	Nov. 1995 to Dec. 1995	Dec. 1994 to Dec. 1995
seasonally adjusted				
	\$ millions		% change	
Sales	1,179.6	1,185.3	0.5	5.3
Inventories	5,611.4	5,575.2	-0.6	8.9

^r Revised figures

^p Preliminary figures

Department store sales including concessions

	Dec. 1995	Dec. 1994 to Dec. 1995
unadjusted		
	\$ millions	% change
Canada	2,264.1	3.4
Newfoundland	x	x
Prince Edward Island	x	x
Nova Scotia	79.4	0.7
New Brunswick	56.1	-1.0
Quebec	379.8	2.9
Ontario	965.2	2.5
Manitoba	94.4	3.6
Saskatchewan	71.9	6.7
Alberta	253.5	5.5
British Columbia, Yukon, the North-west Territories	322.2	6.7

* Confidential to meet the secrecy requirements of the Statistics Act.

Note to readers

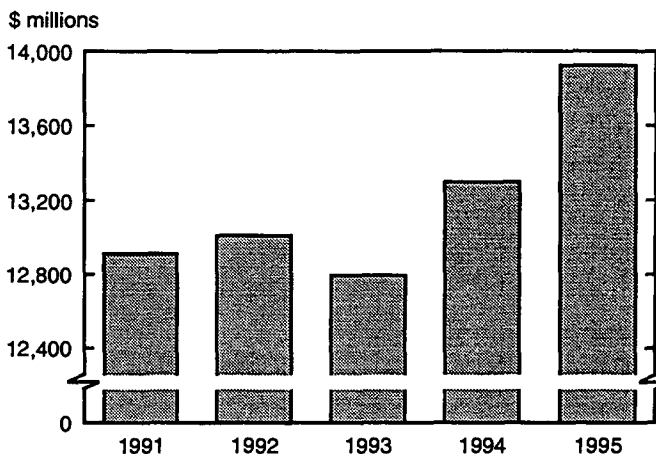
The major department stores are The Bay, Eaton and Sears. The discount stores are K-Mart, Wal-Mart and Zeller's.

Department store type merchandise is defined as total retail trade minus food, automotive and miscellaneous retail (for example, liquor, wine and beer stores).

1995 in review: Second straight annual increase for department store sales

Despite some monthly declines, consumer spending in department stores was generally robust in 1995. Over the year, consumers spent \$13.9 billion in department stores, up 4.7% over 1994. The strength in sales in 1995 was largely attributable to the discount department stores.

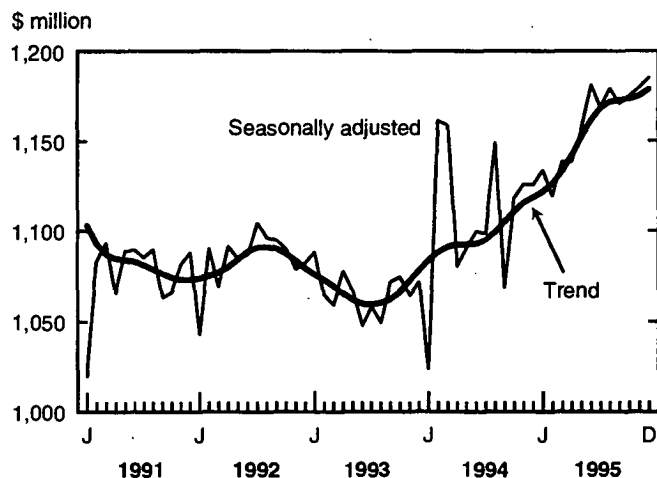
Annual department store sales



Overall department store sales have been on an upward trend since mid-1993. However, the pace of growth did start to slow in July 1995.

The sales jump in 1995 followed an increase in 1994 (+3.9%) and a decline in 1993 (-1.7%). Sales fell in only three months of 1995.

Department store sales have been on the increase since mid-1993



Department stores made some gains

Department stores made gains in 1995 over all other retailers who sell products similar to those found in department stores. Department stores' share of this "department store type merchandise" moved from 20.4% in 1991 (high) to 18.5% in 1994 (low). In 1995, their share rose to 19.1%. (These calculations of share are based on the January-to-November cumulative period of each year.)

Tough year for majors, record sales for discounters

The major department stores experienced their third consecutive annual decline in sales last year as sales amounted to \$6.5 billion, down 3.7% from 1994. Sales also declined in 1994 (-1.1%) and in 1993 (-4.7%). Overall, there were four fewer major stores in December 1995 than in December 1994.

By contrast, the discount retailers posted record sales increases in every month of 1995 except February. Consumers bought \$7.4 billion in goods and services from these stores, up 13.4% from 1994. This followed a healthy 9.7% increase in 1994.

There was a net increase of 15 discount stores by the end of 1995 compared with a year earlier. Ontario

gained the most. The market share of the discounters, although volatile, was greater than 50% for all months in 1995. At the end of 1995, discount sales represented 53% of total department store sales.

Consumer spending by merchandise departments

Out of every dollar spent in department stores in 1995, the highest proportion went toward women's clothing and accessories (14 cents). Even so, these items recorded an annual increase of only 0.4% in sales.

Men's clothing and accessories received 11 cents of every consumer dollar, the second largest portion of total sales. Sales of those items rose 6%.

Toiletries, cosmetics and pharmaceutical products represented 10 cents of every dollar spent. Expenditures in this department jumped 15%.

Sales grew in all provinces

Department store sales grew in every province in 1995. The sales increase was highest in Saskatchewan, where consumers spent 11% more in department stores than in the previous year. That followed an 8.4% increase in 1994.

Department stores in Alberta and Manitoba also had healthy sales increases of 7% each. Stores in British Columbia posted one of the slowest advances (+2.5%). In the metropolitan regions, Calgary's department stores led with an increase of 7% over 1994.

Consumer spending in department stores in Ontario represented 42% of total department store sales. In 1995, sales in Ontario were 4.0% higher than in the previous year.

Available on CANSIM: matrices 111-113.

The December 1995 issue of *Department store sales and stocks* (63-002, \$16/\$160) will be available in February. See "How to order publications".

For further information on this release, contact Leslie Kiss (613-951-3556), Retail Trade Section, Industry Division. ■

Industrial product price index

1995 (annual average) and December 1995 (preliminary)

Driven mainly by export-oriented inputs, 1995's annual average increase in industrial prices was 8.1%, its largest jump since 1981. Industrial prices slowed in the first half of 1995, and then stagnated in the second half.

Of the main product categories, paper and paper products saw the steepest annual average price increase (+38%). This stimulated a 21% increase in printing and publishing prices.

Prices rose in every major commodity group except wood products. A very low level of residential construction particularly hurt softwood lumber prices.

Because many export prices are quoted in U.S. dollars, changes in the Canadian-U.S. exchange rate in 1995 significantly influenced the month-to-month fluctuations in industrial prices. The fluctuations amplified the change in the price index in some months and dampened it in others. During the year, this rate fluctuated between US\$1=C\$1.337 and US\$1=C\$1.416.

Newspapers felt pinched by higher paper prices

In 1995, the largest annual average price increase in a major industrial sector was 38% for paper and paper products. Pulp and paper plants around the world operated at close to full capacity in an attempt to meet the demand. As a result, pulp's annual average price increase was 61%; newsprint's increase was 43%.

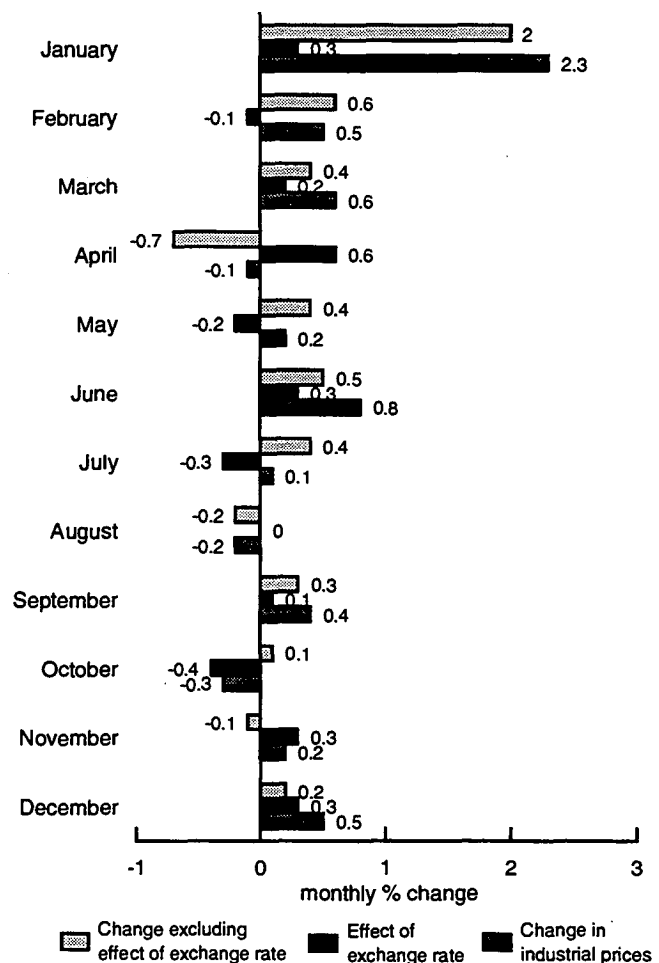
Many North American newspapers responded by changing format to reduce consumption; publishers moved to thinner paper and/or narrower pages. In the printing and publishing sector, the annual average price increase was 21%, a consequence of the price increase for paper.

Note to readers

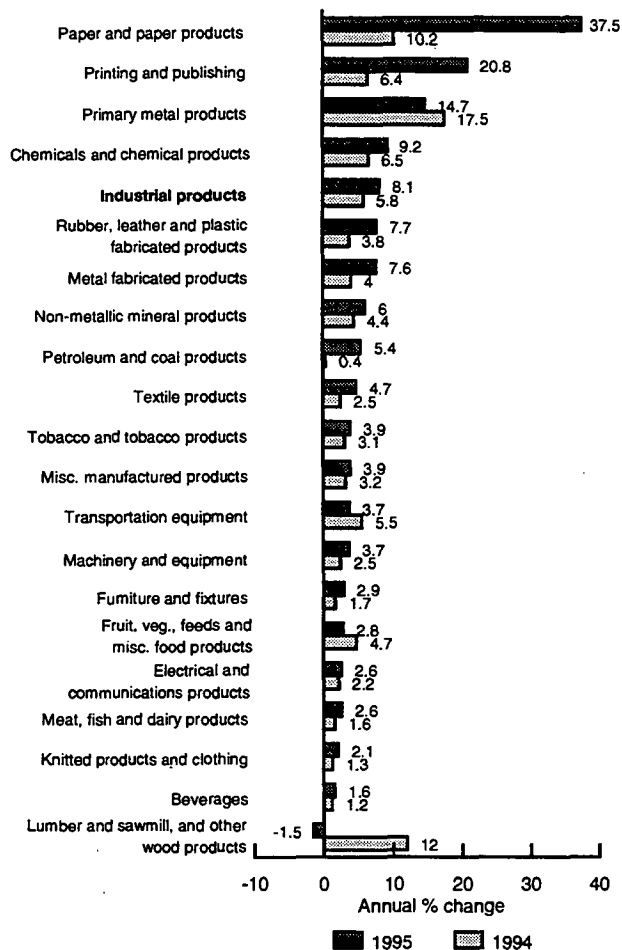
The industrial product price index (IPPI) reflects the prices producers receive as goods leave their plants. It does not reflect what consumers pay. Unlike the consumer price index, the IPPI excludes indirect taxes and all costs (including the transportation, wholesale, and retail costs) occurring from the time a good leaves a plant until a final user takes possession.

Canadian producers export many goods. They often quote their prices in foreign currencies, particularly for motor vehicles, pulp, paper, and wood products. A rise or fall in the value of the Canadian dollar against the U.S. dollar therefore affects the IPPI. A 1% change in the value of the Canadian dollar against the U.S. dollar has been estimated to change the IPPI by about 0.2%.

Canadian-U.S. exchange rates exerted a strong effect on 1995's industrial prices



Paper and paper products led the annual increases in industrial product prices in 1995



Primary metal products (+15%) ranked third in annual average price increases, mainly due to non-ferrous metal products (+21%). In addition, much of an 8% annual average increase in iron and steel product prices was caused by a rise in cost of the non-ferrous metals used in making steel alloys, particularly nickel.

The principal non-ferrous metal products posted substantial annual average price increases: aluminum products (+24%), copper and copper alloy products (+24%), and nickel products (+34%). After increasing steadily in 1994, prices for these products peaked in early 1995. Then, as economic conditions weakened, prices fluctuated or tended to move downward. Consequently, in December, aluminum product prices were down 9% from December 1994. Copper and copper alloy product prices were down 3%. Nickel product prices were virtually unchanged.

Changes to the publication

The format of Industry price indexes (62-011) will change effective with the January 1996 issue. The new format will illustrate monthly data for the current year and the previous year only. Annual averages for the current and previous years will be shown as well. The consulting engineering services price indexes tables 7 and 8 will be discontinued because they are published in the quarterly Construction price statistics (62-007, \$23/\$76).

If readers need to refer to historical data, particularly from 1991 to 1994, we recommend keeping the June 1995 issue of Industry price indexes (62-011) as a reference. Effective with the January 1996 release, that publication will contain data for the current and previous years only.

For further information on these changes, or to comment, contact Lorne Stanton (613-951-9602, fax: 613-951-2848) or Pierre Després (613-951-9603), Prices Division.

Pulp prices posted first decline since November 1993

In December, the 12-month change in industrial prices continued its decline from the January 1995 peak of +10.3%. It fell to +5.2% in December as prices rose +0.5% from November. However, if the effect of exchange rate movements on prices quoted in U.S. dollars were ignored, the month-to-month change in industrial prices would have been +0.2%.

The exchange rate accounted for most of the increase in motor vehicle prices. Price increases for gasoline, fuel oil, ethylene, and feeds accounted for most of the remainder. The most noteworthy decline was in pulp prices, down 3.4%. This was their first decline since November 1993.

December perspective

In late 1995, economic conditions remained relatively unfavourable for price increases. Internationally, there were few signs of strong growth in North America, Japan or Europe. Canadian domestic demand for industrial products also showed signs of weakness.

The available figures for Canadian manufacturing indicate that, in the first 11 months of 1995, inventories continued to increase. However, new orders declined in 7 of the 10 months from February to November. Unfilled orders were down in 6 of the 7 months from May to November. Employment in manufacturing declined in October, November and December.

Producer price increases outpaced consumer price increases

Discouraged by relatively weak Christmas retail sales, retailers appeared to be absorbing some price increases on consumer goods.

In December, the 12-month change in prices at the manufacturers' level increased by about 1.5 to 2 percentage points more than at the consumer level. At the manufacturers' level, December's 12-month price increase for domestic consumer goods rose to just under 4%.

The 12-month change in the goods' component of the CPI was a little less than half that. It edged down

to +1.7%. Usually, about half of the consumer dollar goes to manufacturers, the rest goes to wholesalers, retailers, transporters and governments.

Available on CANSIM: matrices 2000-2008.

The December 1995 issue of *Industry price indexes* (62-011, \$21/\$210) will be available at the end of February. 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. □

Industrial product price indexes
 (1986=100)

	Relative importance	Dec. 1994	Nov. 1995 ^r	Dec. 1995 ^p	Dec. 1994 to Dec. 1995	Nov. 1995 to Dec. 1995
					% change	
Industrial product price index (IPPI)	100.0	123.8	129.6	130.2	5.2	0.5
IPPI excluding petroleum and coal products	93.6	125.9	132.2	132.6	5.3	0.3
Intermediate goods¹	60.4	125.9	133.3	133.7	6.2	0.3
First-stage intermediate goods ²	13.4	137.1	147.4	147.3	7.4	-0.1
Second-stage intermediate goods ³	47.0	122.7	129.3	129.9	5.9	0.5
Finished goods⁴	39.6	120.7	124.1	124.7	3.3	0.5
Finished foods and feeds	9.9	121.3	124.0	124.2	2.4	0.2
Capital equipment	10.4	123.3	126.8	127.5	3.4	0.6
All other finished goods	19.3	119.0	122.6	123.5	3.8	0.7
Aggregation by commodities						
Meat, fish and dairy products	7.4	116.3	120.5	120.8	3.9	0.2
Fruit, vegetable, feed, miscellaneous food products	6.3	124.2	126.9	128.2	3.2	1.0
Beverages	2.0	127.2	129.0	129.0	1.4	0.0
Tobacco and tobacco products	0.7	164.3	172.6	172.6	5.1	0.0
Rubber, leather, plastic fabric products	3.1	124.1	127.6	127.4	2.7	-0.2
Textile products	2.2	114.2	119.1	118.7	3.9	-0.3
Knitted products and clothing	2.3	116.2	118.8	118.9	2.3	0.1
Lumber, sawmill, other wood products	4.9	157.6	153.3	152.9	-3.0	-0.3
Furniture and fixtures	1.7	122.7	125.4	125.4	2.2	0.0
Paper and paper products	8.1	129.2	170.9	170.1	31.7	-0.5
Printing and publishing	2.7	153.3	175.9	175.8	14.7	-0.1
Primary metal products	7.7	134.4	132.1	132.6	-1.3	0.4
Metal fabricated products	4.9	121.5	128.6	128.8	6.0	0.2
Machinery and equipment	4.2	124.2	127.9	128.2	3.2	0.2
Autos, trucks, other transportation equipment	17.6	118.7	122.1	123.2	3.8	0.9
Electrical and communications products	5.1	116.5	118.0	118.4	1.6	0.3
Non-metallic mineral products	2.6	118.1	123.7	123.8	4.8	0.1
Petroleum and coal products ⁵	6.4	93.2	92.7	94.6	1.5	2.0
Chemicals and chemical products	7.2	132.1	131.4	132.7	0.5	1.0
Miscellaneous manufactured products	2.5	119.8	123.4	123.6	3.2	0.2
Miscellaneous non-manufactured commodities	0.4	95.8	96.0	97.1	1.4	1.1

¹ Intermediate goods are goods used principally to produce other goods.

² First-stage intermediate goods are items used most frequently to produce other intermediate goods.

³ Second-stage intermediate goods are items most commonly used to produce final goods.

⁴ Finished goods are goods most commonly used for immediate consumption or capital investment.

⁵ This index is estimated for the current month.

^r Revised figures.

^p Preliminary figures.

Raw materials price index

1995 (annual average) and December 1995 (preliminary)

Manufacturers paid 8.5% more for raw materials in 1995 than in 1994. It was the third year in a row where the annual average increased substantially. Most of the increase came from higher prices for metals, crude oil, vegetable products and wood.

Prices rose substantially for a third straight year

Prices for raw materials have increased substantially over the past three years. The increase in 1995 followed a 7.7% rise in 1994 and 5.9% advance in 1993. Non-ferrous metals (+20%) led the increases in 1995, followed by crude oil (+10%), vegetable products (+10%) and wood (+9%).

On a monthly basis, manufacturers paid 1.8% more for raw materials in December than in November. Prices were 2.2% higher than in December 1994. Higher monthly prices in December for crude oil (+4.6%) and grains (+3.1%) were somewhat offset by lower raw tobacco (-4.6%) and cattle (-1.9%) prices.

Metal prices weakened in the last half

Non-ferrous metal prices increased almost 20% in 1995. The major contributors were copper (+26%), nickel (+34%), aluminum materials (+21%) and lead (+16%). Prices for most of these metals, except lead, decreased in the last six months of 1995.

Base metal prices weakened again in December as industrial activity slowed in the G7 nations. As well, inventories of stainless steel have been reduced in Europe and the Far East.

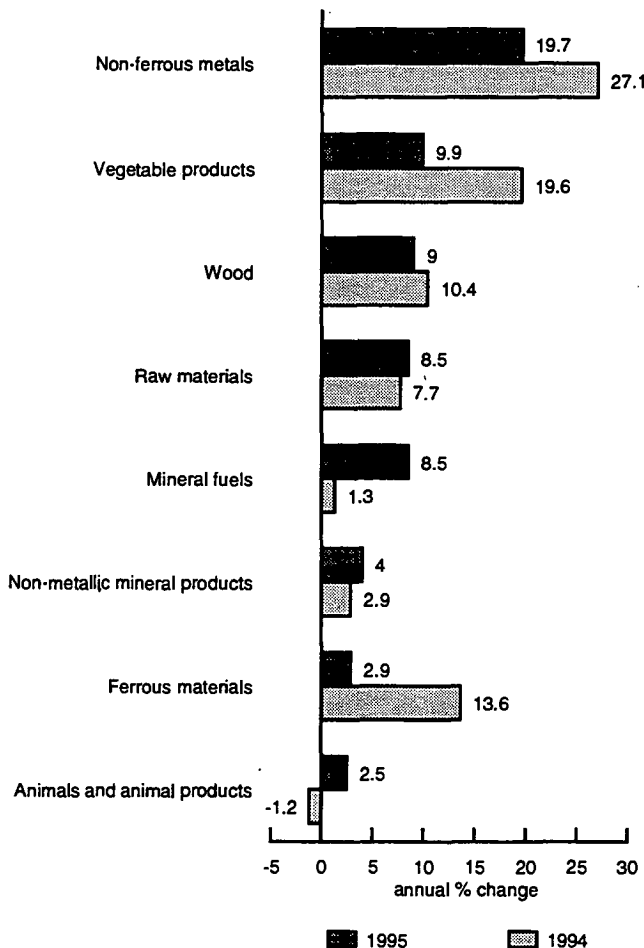
Metal prices in 1996 will depend on the performances of the domestic and export sectors. The auto and construction sectors are major metal users. Canadian auto production set a record for a fourth straight year in 1995, and there is optimism for a fifth record in 1996. Canada's car production outweighs its consumption of domestically produced autos, leaving a surplus for export to the United States.

The construction sector has not yet given strong enough signals for 1996 to bring about a resurgence of demand for metals. The Organisation for Economic Co-operation and Development (OECD) forecast real GDP growth rates for the G7 in 1996 at between 2% and 3%, with Canada leading the way.

Note to readers

The raw materials price index (RMPI) reflects the prices that Canadian manufacturers pay for key raw materials. Many of these prices are set in world markets. Unlike the industrial product price index, the RMPI includes goods that are not produced in Canada.

Non-ferrous metals led the annual increases in raw material prices in 1995



Crude oil prices regained strength late in year

Crude oil prices rose almost 10% on an annual basis in 1995. Prices strengthened in the first six months of the year, and then weakened, regaining strength in November and December.

Recent OPEC talks, which confirmed status-quo production quotas, along with unusually cold weather

in November and December in the United States and Europe tended to firm up oil prices. Low inventory levels added to the upward pressure. Canada exported more crude oil to the United States in 1995, thanks to additional pipeline capacity.

Grain prices escalated

Vegetable product prices increased more than 10% annually in 1995. Higher prices for grains (+17%), rubber (+37%) and raw tobacco (+14%) were marginally offset by lower prices for potatoes and oilseeds.

Grain prices were led by higher prices for wheat (+18%), barley (+32%) and corn (+6%). Wheat prices hit a 15-year high, with world supplies at their lowest levels in almost 20 years. Nearly all the world's wheat-growing countries were faced with poor weather during the growing season.

Higher Canadian wheat prices, which rose almost \$40 per ton in 1995, helped farmers defray new grain transportation costs after the federal government ended subsidized rail movement of grains to ports. Wheat sales to China, Canada's largest single foreign buyer, rose 35% compared with 1994.

Hog prices rose almost 5% annually compared with 1994. Prices in December were up 34% from December 1994. Cattle prices declined more than 6% annually in 1995. A surplus of hogs and cattle, accompanied by high feed costs (+17% from December 1994 to December 1995), could further dampen price increases.

Wood prices rose for a fifth straight year

Wood prices increased 9% from 1994 to 1995, a fifth straight annual average increase. Wood prices have increased almost 80% since 1990.

Changes to the publication

The format of Industry price indexes (62-011) will change effective with the January 1996 issue. The new format will illustrate monthly data for the current year and the previous year only. Annual averages for the current and previous years will be shown as well. The consulting engineering services price indexes tables 7 and 8 will be discontinued because they are published in the quarterly Construction price statistics (62-007, \$23/\$76).

If readers need to refer to historical data, particularly from 1991 to 1994, we recommend keeping the June 1995 issue of Industry price indexes (62-011) as a reference. Effective with the January 1996 release, that publication will contain data for the current and previous years only.

For further information on these changes, or to comment, contact Lorne Stanton (613-951-9602, fax: 613-951-2848) or Pierre Després (613-951-9603), Prices Division.

In 1995, wood prices weakened in the last half of the year, a result of significantly lower log prices and stagnating pulpwood prices. Pulpwood demand should pick up in 1996 because of orders for printing and writing paper from Europe and increased U.S. demand for paper due to the upcoming Olympic Games and the U.S. Presidential election.

Log prices may be subject to a price change if there is further study concerning Canadian stumpage fees and exports of lumber to the United States. Canadian sales of softwood lumber (mainly from Quebec and Ontario) to the United States rose in 1995.

Available on CANSIM: matrices 2000-2008.

The December 1995 issue of *Industry price indexes* (62-011, \$21/\$210) will be available at the end of February. 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. □

Raw materials price index
(1986=100)

	Relative importance	Dec. 1994	Nov. 1995 ^r	Dec. 1995 ^p	Dec. 1994 to Dec. 1995	Nov. 1995 to Dec. 1995
					% change	
Raw materials price index (RMPI)	100.0	126.5	127.0	129.3	2.2	1.8
Mineral fuels	31.7	104.6	104.5	109.0	4.2	4.3
Vegetable products	10.3	122.1	132.2	133.8	9.6	1.2
Animals and animal products	25.5	105.4	110.7	112.3	6.5	1.4
Wood	13.1	210.6	202.4	204.2	-3.0	0.9
Ferrous materials	3.6	122.4	119.2	119.8	-2.1	0.5
Non-ferrous metals	13.2	145.7	139.6	140.0	-3.9	0.3
Non-metallic minerals	2.6	102.0	107.3	106.5	4.4	-0.7
RMPI excluding mineral fuels	68.3	136.6	137.4	138.7	1.5	0.9

^r Revised figures.

^p Preliminary figures.

OTHER RELEASES

Electric power selling price indexes

September to December 1995

Electric power selling price indexes (1986=100) are now available for the period from September to December 1995.

Available on CANSIM: matrix 2020.

The December 1995 issue of *Industry price indexes* (62-011, \$21/\$210) will be available at the end of February. See "How to order publications".

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

Annual survey of manufactures

1994

The Annual Survey of Manufactures provides information on over 200 different industries. Principal

statistics for each industry will be released as they become available. Data for the industries listed in the table below are now available.

Available on CANSIM: matrices 5384, 5398, 5434, 5440, 5443, 5487, 5491, 5550-5551, 5561, 6856 and 6880.

Data for the industries listed in the table will appear in *Food industries* (32-250-XPB, \$38), *Textile products industries* (34-251-XPB, \$38), *Clothing industries* (34-252-XPB, \$38), *Paper and allied products industries* (36-250-XPB, \$38), *Transportation equipment industries* (42-251-XPB, \$38), *Non-metallic mineral products industries* (44-250-XPB, \$38) and *Chemical and chemical products industries* (46-250-XPB, \$38). The publications will be released at a later date. See "How to order publications".

Value of shipments

	1993	1994	1993 to 1994 %	Catalogue	Contact	Phone (613)
	\$ millions		change			
Industry (SIC)						
Frozen fruit and vegetable (1032)	1,036.4	957.7	-7.6	32-250-XPB	P. Zylstra	951-3511
Potato chip, pretzel and popcorn (1093)	751.3	849.4	13.1	32-250-XPB	P. Zylstra	951-3511
Contract textile dyeing and finishing (1992)	278.3	272.1	-2.2	34-251-XPB	N. Charron	951-3510
Men's and boys' coat (2431)	161.8	160.3	-0.9	34-252-XPB	N. Charron	951-3510
Men's and boys' shirt and underwear (2434)	594.2	598.9	0.8	34-252-XPB	N. Charron	951-3510
Other paper (2719)	2,903.7	3,367.8	16.0	36-250-XPB	B. Pepin	951-3516
Paper bag (2733)	250.9	238.1	-5.1	36-250-XPB	B. Pepin	951-3516
Motor vehicle (3231)	37,802.5	44,557.9	17.9	42-251-XPB	A. Shinnan	951-3515
Truck and bus body (3241)	456.2	518.5	13.6	42-251-XPB	A. Shinnan	951-3515
Motor vehicle fabric accessories (3257)	1,636.1	2,019.3	23.4	42-251-XPB	A. Shinnan	951-3515
Primary glass and glass containers (3561)	606.3	669.8	10.5	44-250-XPB	S. O'Brien	951-3514
Printing ink (3791)	291.8	320.4	9.8	46-250-XPB	B. Meyer	951-3528

PUBLICATIONS RELEASED

Gas utilities, October 1995

Catalogue number 55-002

(Canada: \$16/\$160; United States: US\$20/US\$200;
other countries: US\$23/US\$230).

Employment, earnings and hours, October 1995

Catalogue number 72-002

(Canada: \$31/\$310; United States: US\$38/US\$372;
other countries: US\$44/US\$434).

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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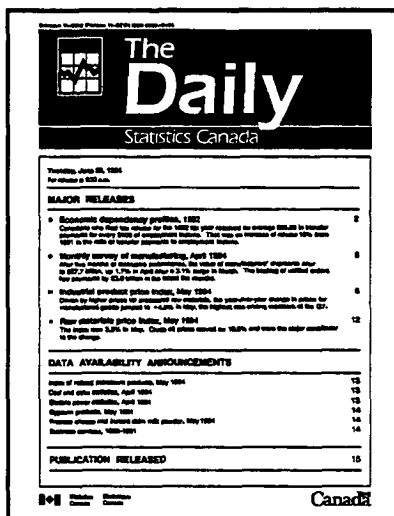
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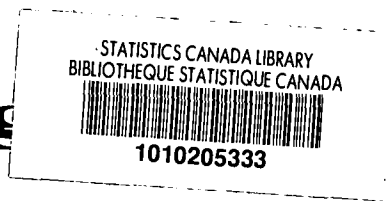
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RELEASE DATES

January 29 to February 2
(Release dates are subject to change.)

Release date	Title	Reference period
29	Labour market year-end review (advance release)	1995
29	Employment, earnings and hours	December 1995
31	Focus on culture	Winter 1995
31	Real gross domestic product at factor cost by industry	November 1995
31	Unemployment insurance	November 1995
1	Business conditions survey: Canadian manufacturing industries	January 1996
1	Grain stocks	December 31, 1995

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