



The Daily

Statistics Canada

Wednesday, January 22, 1997

For release at 8:30 a.m.

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The financial and housing sectors again led the growth of the index, which rose 0.7% in December.
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Retail sales continued to increase in November as consumers spent more on big-ticket items.

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MAJOR RELEASES

Composite Index

December 1996

The leading indicator ended the year on a good note, rising 0.7% in December after a 0.8% gain in November — the best back-to-back increases of the year. The financial markets continued to lead the way, while housing showed a strong response to historically low interest rates. However, weakening demand for exports checked the growth of manufacturing.

The housing index was up 2.8%, its best showing in five years. Starts of single-family homes continued to accelerate, following increased house sales last autumn. Spending on durable goods began to pick up, another sign of improving confidence. Conversely, demand for services remained sluggish, reflecting the slack in incomes.

The stock market trended up by 3.1% in December, before improving further early in the new year. The money supply posted its largest monthly expansion since 1994.

Manufacturing activity sagged, partly reflecting the slowing trend of the U.S. economy throughout the

second half of 1996. New orders showed weakness, as exports remained slow partly due to the effects of the General Motors auto strike. The average work week shrank by 0.4 hours from its April peak.

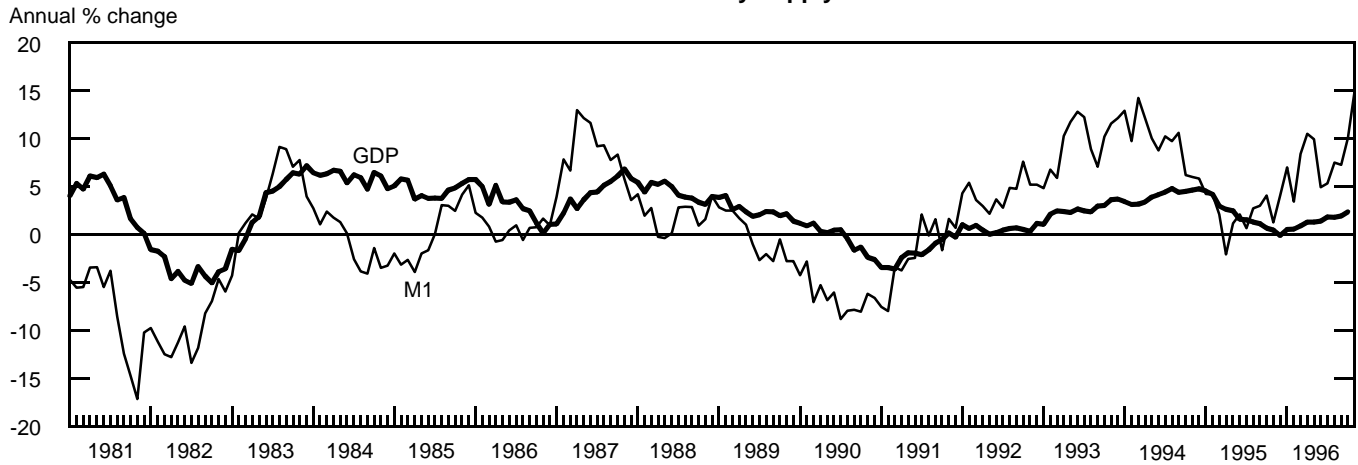
The U.S. leading indicator showed the same sources of strength and weakness as Canada's. Growth was concentrated in the financial markets and housing, while manufacturing demand slowed.

Available on CANSIM: matrix 191.

For further information on the economy, the January 1997 issue of *Canadian economic observer* (11-010-XPB, \$22/\$220) will be available shortly. The *Historical statistical supplement* (11-210-XDB, \$50) is also available in electronic format. This diskette allows you to use the software of your choice to easily manipulate the CEO's extensive range of economic data. See *How to order publications*.

For further information on this release, contact Francine Roy (613-951-3627), Current Economic Analysis Group.

GDP and the money supply



Composite Index

	July 1996	Aug. 1996	Sept. 1996	Oct. 1996	Nov. 1996	Dec. 1996	Last month of data available
	% change						
Composite leading indicator (1981=100)	178.8	179.6	180.6	181.7	183.2	184.4	0.7
Housing index (1981=100) ¹	115.5	117.0	118.6	119.7	122.5	125.9	2.8
Business and personal services employment ('000)	2,052	2,056	2,058	2,058	2,058	2,059	0.0
TSE 300 stock price index (1975=1,000)	5,087	5,104	5,140	5,222	5,377	5,542	3.1
Money supply, M1 (\$ millions, 1981) ²	32,763	32,877	33,002	33,255	33,684	34,145	1.4
U.S. composite leading indicator (1967=100) ³	215.9	216.7	217.5	218.3	218.8	219.3	0.2
Manufacturing							
Average work week (hours)	38.4	38.3	38.2	38.2	38.1	38.1	0.0
New orders, durables (\$ millions, 1981) ⁴	12,532	12,590	12,698	12,767	12,812	12,752	-0.5
Shipments/inventories of finished goods ⁴	1.58	1.60	1.63	1.65	1.67	1.67	0.00*
Retail trade							
Furniture and appliance sales (\$ millions, 1981) ⁴	1,137.1	1,137.5	1,138.6	1,141.6	1,148.2	1,154.3	0.5
Other durable goods sales (\$ millions, 1981) ⁴	3,977.3	3,976.0	3,975.0	3,975.1	3,977.5	3,987.1	0.2
Unsmoothed composite	180.2	181.5	183.1	184.7	187.7	186.1	-0.9

¹ Composite index of housing starts (units) and house sales (multiple listing service).

² Deflated by the Consumer Price Index for all items.

³ The figures in this row are published in the month indicated, but refer to data for the previous month.

⁴ The figures in this row are published in the month indicated, but refer to data for two months earlier.

* Difference from previous month.

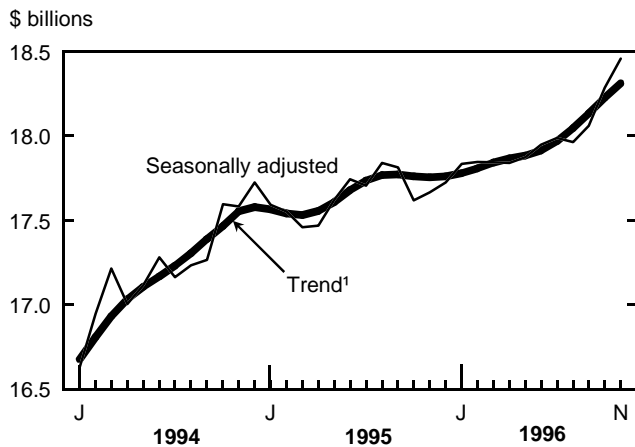


Retail trade

November 1996 (preliminary)

Retail sales continued to increase in November as consumers spent more on big-ticket items. Sales rose 0.9% in November to \$18.4 billion, following a similarly large increase in October (+1.3%). This growth spurt contrasts with the slow growth that retailers had been experiencing since the end of 1995.

Retail sales continued to grow in November



¹ Trend represents smoothed seasonally adjusted data.

Durable goods stores lead growth

Sales by retailers of durable goods accounted for most of the growth in retail sales. In dollar terms, advances were greatest in the automotive (+2.9%), furniture (+3.5%) and general merchandise (+1.3%) sectors. Stores selling other durable and semi-durable goods also saw an increase in sales (+1.1% and +0.6%, respectively). The cumulative impact of interest rate reductions may have influenced consumers to purchase big-ticket items at low rates of financing.

Sales in the automotive sector advanced for the fourth consecutive month, led by motor vehicle and recreational vehicle dealers (+2.9%). With the exception of the winter of 1994/95, when sales declined slightly, the automotive sector has generally been growing. While the number of new vehicles sold rose 0.5%, their cost climbed 3.9% in November.

The growth in the furniture sector offset the decrease observed in October. Sales in this sector have generally grown since April 1996. While in dollar terms, furniture sales have not been this high since

March 1995, they are still below the peak reached in December 1994.

Sales in the general merchandise sector increased for the second consecutive month. These increases more than offset declines in August (-0.1%) and September (-1.9%). Sales from January to November 1996 were 5.4% larger than during the same period in 1995, and 10.3% greater than the same period in 1994.

The drugstore sector grew (+1.2%) for the third consecutive month. These three months, however, did not offset the large decline observed in August. Drug store sales have been generally declining since July 1996, after a period of sustained growth from July 1995 to May 1996. Sales from January to November 1996 were 4.8% greater than during the same period in 1995, but were only 3.5% higher than the same period in 1994.

The decline in both the clothing (-2.3%) and food (-1.1%) sectors virtually cancelled October's large increase. Sales in the clothing sector from January to November 1996 were 2.5% smaller than the same period in 1995. Cumulative sales in the food sector for the first 11 months of 1996 have declined 2.3% from the same period in the previous year.

Surging sales in Saskatchewan

For the first 11 months of 1996, the Prairie provinces (led by Saskatchewan) and the Atlantic provinces (except Newfoundland) have fared better than the national average. Retail sales in British Columbia grew, but at a rate below the national level. Ontario and Newfoundland were the only provinces recording declines.

Retail sales in the Prairies have surged since June 1996, as wheat production surpassed the billion bushel mark for the first time since 1993 and record levels were reached for barley production.

The growth experienced in New Brunswick and Prince Edward Island has moderated somewhat. Both provinces experienced a decline in retail sales in the month of November (-1.5% and -1.8% respectively).

Early indicators of December sales

Employment in trade increased 0.2% in December. Housing starts rose 17% in November. Early indications point to an increase in the number of vehicles sold in December. Retail sales in the United States were up 0.6% in December, following a 0.4% decrease in November.

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

The November 1996 issue of *Retail trade* (63-005-XPB, \$20/\$200) will be available shortly. See *How to order publications*.

For further information on this release, contact Louise G n reux (613-951-3549). For analytical information, contact Greg Peterson (613-951-3592), Retail Trade Section, Industry Division.

Retail sales

	Nov. 1995	Aug. 1996 ^r	Sept. 1996 ^r	Oct. 1996 ^r	Nov. 1996 ^p	Oct. to Nov. 1996	Nov. 1995 to Nov. 1996
	seasonally adjusted						
	\$ millions				% change		
Food	4,434	4,421	4,423	4,512	4,462	-1.1	0.6
Supermarkets and grocery stores	4,092	4,082	4,068	4,147	4,094	-1.3	0.1
All other food stores	343	339	354	364	368	1.1	7.4
Drug and patent medicine stores	1,017	1,021	1,030	1,032	1,044	1.2	2.6
Clothing	1,039	1,035	1,040	1,066	1,041	-2.3	0.1
Shoe stores	143	144	144	148	145	-1.8	1.3
Men's clothing stores	130	126	127	131	128	-2.3	-1.1
Women's clothing stores	328	328	336	336	335	-0.2	2.2
Other clothing stores	439	437	433	451	432	-4.2	-1.5
Furniture	877	888	901	894	925	3.5	5.5
Household furniture and appliance stores	683	691	701	689	724	5.1	6.1
Household furnishings stores	194	198	200	205	201	-1.9	3.4
Automotive	6,372	6,630	6,672	6,796	6,990	2.9	9.7
Motor vehicle and recreational vehicle dealers	4,164	4,292	4,323	4,422	4,625	4.6	11.1
Gasoline service stations	1,232	1,331	1,308	1,339	1,328	-0.8	7.8
Automotive parts, accessories and services	977	1,007	1,041	1,035	1,037	0.2	6.1
General merchandise stores	1,902	2,000	1,989	2,009	2,036	1.3	7.1
Retail stores not elsewhere classified	1,990	1,935	1,972	1,945	1,927	-0.9	-3.2
Other semi-durable goods stores	576	603	639	622	626	0.6	8.6
Other durable goods stores	440	482	474	467	472	1.1	7.2
All other retail stores not elsewhere classified.	973	850	858	856	829	-3.1	-14.8
Total, retail sales	17,632	17,930	18,026	18,252	18,425	0.9	4.5
Total excluding motor vehicle and recreational vehicle dealers	13,468	13,638	13,703	13,830	13,799	-0.2	2.5
Department store type merchandise	5,852	6,029	6,073	6,089	6,144	0.9	5.0
Provinces and territories							
Newfoundland	287	284	274	286	287	0.3	-0.1
Prince Edward Island	79	78	79	81	79	-1.8	0.6
Nova Scotia	520	565	552	578	581	0.6	11.8
New Brunswick	435	452	447	450	443	-1.5	2.0
Quebec	4,220	4,276	4,359	4,464	4,415	-1.1	4.6
Ontario	6,439	6,444	6,526	6,461	6,600	2.2	2.5
Manitoba	604	660	663	670	672	0.4	11.3
Saskatchewan	560	594	590	602	616	2.3	9.9
Alberta	1,870	1,915	1,933	1,975	1,991	0.8	6.5
British Columbia	2,560	2,599	2,541	2,622	2,677	2.1	4.6
Yukon	20	23	23	24	23	-4.3	13.0
Northwest Territories	36	39	39	39	39	-1.7	7.0

^r Revised figures.

^p Preliminary figures.

Retail sales

	Nov. 1995	Oct. 1996 ^f	Nov. 1996 ^p	Nov. 1995 to Nov. 1996
unadjusted				
	\$ millions			% change
Food	4,327	4,517	4,493	3.8
Supermarkets and grocery stores	4,008	4,162	4,145	3.4
All other food stores	318	355	348	9.3
Drug and patent medicine stores	1,027	1,059	1,051	2.4
Clothing	1,195	1,121	1,217	1.8
Shoe stores	171	163	178	3.9
Men's clothing stores	159	135	162	1.7
Women's clothing stores	353	350	371	5.0
Other clothing stores	512	474	506	-1.0
Furniture	977	957	1,044	6.9
Household furniture and appliance stores	759	736	813	7.2
Household furnishings stores	218	220	231	5.7
Automotive	6,251	6,965	6,768	8.3
Motor vehicle and recreational vehicle dealers	3,917	4,501	4,284	9.4
Gasoline service stations	1,232	1,368	1,301	5.6
Automotive parts, accessories and services	1,102	1,095	1,182	7.3
General merchandise stores	2,389	2,098	2,574	7.7
Retail stores not elsewhere classified	2,038	1,844	1,985	-2.6
Other semi-durable goods stores	615	604	663	7.9
Other durable goods stores	459	412	484	5.5
All other retail stores not elsewhere classified	965	827	837	-13.2
Total, retail sales	18,204	18,559	19,131	5.1
Total excluding motor vehicle and recreational vehicle dealers	14,288	14,058	14,847	3.9
Department store type merchandise	6,662	6,251	7,033	5.6
Provinces and territories				
Newfoundland	307	291	311	1.3
Prince Edward Island	81	81	81	0.2
Nova Scotia	544	580	611	12.3
New Brunswick	462	462	470	1.8
Quebec	4,303	4,559	4,556	5.9
Ontario	6,792	6,584	6,952	2.3
Manitoba	627	686	703	12.1
Saskatchewan	584	627	651	11.5
Alberta	1,908	2,006	2,058	7.8
British Columbia	2,540	2,621	2,681	5.5
Yukon	19	24	22	10.9
Northwest Territories	37	40	37	0.4

^f Revised figures.

^p Preliminary figures.



OTHER RELEASES

Production and disposition of tobacco products

December 1996

Cigarette production in December experienced its usual year-end drop, while November sales were up; this resulted in lower closing inventories.

Manufacturers produced 3.2 billion cigarettes in December, down 39.9% from the previous month. December production was at its lowest level in three years and was 22.4% lower than in December 1995. Cigarette production in 1996 was 2.5% lower than the previous year.

Seasonal sales pushed December shipments to 4.7 billion cigarettes, up a strong 18.5% from the previous month, but 2.4% less than a year earlier. The domestic portion of shipments was higher than those in the same month a year earlier, while exports continued to decline. On an annual basis, 1996 shipments were down 2.5% from the previous year, as a 3.4% increase in the domestic market was more than offset by a 54.0% drop in exports.

After a three-month build-up, inventories were drawn down by almost 30% to a relatively low 4 billion cigarettes. This is 4.3% below 1995 year-end inventories.

Domestic shipments data are the aggregate of shipments reported by Canadian manufacturers. They are not retail level sales or final consumption.

Note: Beginning with the January 1997 issue of *Production and disposition of tobacco products*, the publication will contain seasonally adjusted data on the production and disposition (domestic shipments, exports and changes in inventories) of cigarettes.

Available on CANSIM: matrix 46.

The December 1996 issue of *Production and disposition of tobacco products* (32-022-XPB, \$6/\$60) will be available shortly. See *How to order publications*.

For further information on this release, contact Peter Zylstra (613-951-3511; Internet: zylstra@statcan.ca), Industry Division. ■

Industrial monitor on CD-ROM

January 1997

Industrial monitor on CD-ROM offers data on 165 manufacturing industries and 33 non-manufacturing

industries covering construction, wholesale and retail trade. This extremely current information is offered on 24 sectors, and can be purchased by individual sector or as a complete package.

For each industry, up to 50 variables are organized in the Table viewer in five table types that include supply, demand, price, labour/employment, and investment/capital stock. The underlying database is also available via the Series browser for more extensive time series analysis and inter-industry comparisons.

Industrial monitor on CD-ROM is linked to the *Standard industrial classification manual*, provides "pop-up" textual descriptions for every series, and embodies consistent data conventions — all features designed to make analysis easy and accurate. State-of-the-art functions offer searching, graphing, viewing, exporting and transforming capabilities, providing you with the exact information you require quickly and easily.

The January 1997 issue of *Industrial monitor on CD-ROM* is now available. The full package (15F0015XCB) costs \$3,000, a savings of more than 40% over the annual subscription price of \$250 per individual sector. You will receive an updated CD-ROM once each month. See *How to order publications*.

For further information on this release, or to request a demonstration CD-ROM, contact Milt Ingalls (613-951-9060), Industry Measures and Analysis Division or the Statistics Canada Regional Reference Centre nearest you. ■

Waste Management Industry Survey: business sector

1994

The report, *1994 Waste Management Industry Survey: business sector* presents detailed results from the 1994 Waste Management Industry Survey: business sector. This report (16F0003XPE, \$30) is now available in paper format and on the Internet (<http://www.statcan.ca>).

For further information on the release, or to order a paper copy, contact the information officer (613-951-3640; fax: 613-951-3618), National Accounts and Environment Division. ■

Annual Survey of Manufactures 1995

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.

As of today, principal statistics at the national level are available for a total of 41 industries.

Available on CANSIM: matrices 5444, 5467, 5529, 6849 and 6863.

Data for the industries listed in the table will appear in *Clothing industries* (34-252-XPB, \$38), *Wood industries* (35-250-XPB, \$53), *Fabricated metal products industries* (41-251-XPB, \$38) and *Non-metallic mineral products industries* (44-250-XPB, \$38). The publications will be released at a later date. See *How to order publications*.

For further information, see the contacts listed below (fax: 613-951-9499 ; Internet: desrosi@statcan.ca).

Value of shipments

	1994	1995	1994 to 1995 %	Catalogue number	Contact	Telephone (613)
	\$ millions		change			
Industry (SIC)						
Men's and boys' clothing contractors (2435)	169.3	162.2	-4.2	34-252-XPB	N. Charron	951-3510
Wooden box and pallet (2561)	273.3	303.7	11.1	35-250-XPB	B. Pépin	951-3516
Industrial fastener (3053)	626.7	693.0	10.6	41-251-XPB	D. Higgins	951-9837
Clay products (from domestic clay) (3511)	102.3	91.3	-10.8	44-250-XPB	S. O'Brien	951-3514
Non-metallic mineral insulating materials (3594)	397.2	409.7	3.2	44-250-XPB	S. O'Brien	951-3514

PUBLICATIONS RELEASED

Construction type plywood, November 1996
Catalogue number 35-001-XPB
(Canada: \$6/\$60; United States: US\$ 8/US\$72; other countries: US\$9/US\$ 84).

Primary iron and steel, November 1996
Catalogue number 41-001-XPB
(Canada: \$6/\$60; United States: US\$ 8/US\$72; other countries: US\$9/US\$ 84).

Oil pipeline transport, October 1996
Catalogue number 55-001-XPB
(Canada: \$11/\$110; United States: US\$ 14/US\$132; other countries: US\$16/US\$154).

Communications service bulletin: Cellular telephone, 1995, vol. 26, no. 3
Catalogue number 56-001-XPB
(Canada: \$12/\$40; United States: US\$ 15/US\$48; other countries: US\$17/US\$ 56).

Telephone statistics, October 1996
Catalogue number 56-002-XPB
(Canada: \$9/\$90; United States: US\$ 11/US\$108; other countries: US\$13/US\$126).

The consumer price index, December 1996
Catalogue number 62-001-XPB
(Canada: \$10/\$100; United States: US\$ 12/US\$120; other countries: US\$14/US\$140).
Publication and release available at 7:00 a.m. on Thursday, January 23. For release, see the Internet (www.statcan.ca).

Retail chain and department stores, 1994
Catalogue number 63-210-XPB
(Canada: \$37; United States: US\$45; other countries: US\$52).

Touriscope international travel, advance information, November 1997
Catalogue number 66-001-PPB
(Canada: \$7/\$70; United States: US\$ 9/US\$84; other countries: US\$10/US\$ 98).

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