Catalogue 11-001E (Français 11-001F) ISSN 0827-0465

The Daily

Statistics Canada

Wednesday, May 21, 1997
For release at 8:30 a.m.

MAJOR RELEASES

OTHER RELEASES

MAJOR RELEASES

Retail trade

March 1997

Following a period of strong growth since the fall of 1996, retail sales declined 0.8% to $18.9 billion in March from the previous month. Although consumers spent less in March, retail sales remained strong in the first quarter of 1997. Retailers experienced significant advances in retail sales in the last two quarters (+2.6% in the last quarter of 1996 and +1.8% in the first quarter of 1997). These are the strongest back-to-back increases in quarterly sales since the last quarter of 1993 and the first quarter of 1994.

A weaker March ends strong first quarter

Department stores ring in sales...

Only general merchandise stores recorded sales increases in March (+0.5%), due to advances by department stores (+0.8%). For the first three months of 1997, department store sales were 8.8% higher than the same period in 1996. The general merchandise sector has generally grown since June 1993.

Improving department stores sales occurred despite the drop in department store type merchandise sales (-0.9%). The March decline in department store type merchandise sales, which was concentrated in clothing (-1.5%), furniture (-1.0%) and drug stores (-0.6%), appears to be part of a trend first observed in 1996.

Note to readers

All comparisons use seasonally adjusted data unless otherwise noted.

Comparisons using unadjusted data should be read in the context that Easter, which has an effect on retail sales, fell in April of 1996 and in March of 1997.

... while automotive sales slow down

In terms of dollar values, the greatest decline in retail sales in March was in the automotive sector (-1.2%), and evenly split among motor vehicle and recreational vehicle dealers (-0.9%) and automotive parts and accessories stores (-3.8%). Motor and recreational vehicle sales, which spurred the growth in retail sales in 1996, dipped 0.3% from the last quarter of 1996. The automotive sector has generally grown since April 1995.

While sales by motor vehicle and recreational vehicle dealers declined in March (-0.9%), new motor vehicles sales jumped by 8.5%. Of all vehicle dealers, only used car dealers and recreational vehicle dealers registered declining sales. The increase in new cars and trucks purchased at new car dealerships may have been offset by declining sales of used vehicles.

Sales by food stores declined marginally in March (-0.2%) as the small increases in supermarkets and grocery stores (+0.1%) were offset by declining sales in more specialized food stores (-3.7%). Food retailers have experienced a general increase in sales since March 1996 after a downward trend from early 1995.

Despite declines in clothing, furniture, and drug store sales in March, the trend remains upward. Clothing stores have experienced a pattern of growth since January 1996, and advances in the furniture sector have generally been strong since the spring of 1996. Drugstore sales declined slightly from May until August 1996, but have been gaining since.

Western Canada leads retail growth in first quarter

Western Canada registered the strongest advances in retail sales in the first quarter of 1997 (+3.5%), following a similarly strong 3.0% increase in the last quarter of 1996. Alberta posted the strongest retail sales growth (+4.6%) over the last quarter of 1996. Increasing sales in British Columbia in the first quarter of 1997 (+3.6%) and the last quarter of 1996 (+2.0%), ended the weakness observed in the retail sector from the third quarter of 1995.

Quebec retailers posted a quarterly sales increase of 2.5% to advance 8.1% (unadjusted) compared with the same quarter a year earlier. Over two-fifths of this increase, however, was due to motor vehicle and recreational vehicle dealer sales. Excluding sales from these vehicle dealers, the year-over-year increase was 5.9% (unadjusted). Retail sales in Quebec have been increasing since the second quarter of 1996.

Ontario retailers experienced a growth in sales of only 0.7% in March, in contrast with the healthy advances made in the last quarter of 1996 (+2.0%). Compared with the first quarter of 1996, Ontario retail sales increased 1.7% (unadjusted). Over this same period, however, sales by motor and recreational vehicle dealers declined 6.3% (unadjusted). Retail sales, excluding vehicle dealers, rose 4.5% (unadjusted) between the first quarter of 1996 and the first quarter of 1997.

After posting increasing sales for 1996, retailers in Atlantic Canada recorded a 1.3% decline in sales in the first quarter of 1997. Increases in Newfoundland (+0.8%) and Prince Edward Island (+4.2%) were unable to offset declining sales in New Brunswick (-2.9%) and Nova Scotia (-1.5%).

Related indicators of April sales

The number of employees in retail trade increased by 0.6% in April. The number of housing starts in April declined by 7.8% from the same period in 1996. Retail trade in the United States decreased 0.3% in April, after no change in March.

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

The March 1997 issue of *Retail trade* (63-005-XPB, $21/$206) will be available shortly. See *How to order publications*.

For further information on this release, contact Louise Généreux (613-951-3549). For analytical information, contact Greg Peterson (613-951-3592), Retail Trade Section, Distributive Trades Division.

Retail sales

	Mar. 1996	Dec.1996[r]	Jan. 1997[r]	Feb. 1997[r]	Mar. 1997[p]	Feb. 1997 to Mar. 1997	Mar. 1996 to Mar. 1997
	seasonally adjusted						
	$ millions					% change	
Food	**4,396**	**4,590**	**4,669**	**4,684**	**4,674**	**-0.2**	**6.3**
Supermarkets and grocery stores	4,054	4,227	4,310	4,322	4,326	0.1	6.7
All other food stores	342	364	359	362	349	-3.7	1.8
Drug and patent medicine stores	**1,027**	**1,060**	**1,068**	**1,070**	**1,064**	**-0.6**	**3.6**
Clothing	**1,030**	**1,080**	**1,089**	**1,102**	**1,086**	**-1.5**	**5.4**
Shoe stores	137	138	150	145	131	-9.9	-4.5
Men's clothing stores	128	129	128	131	131	0.4	2.8
Women's clothing stores	326	347	349	358	352	-1.6	7.9
Other clothing stores	439	467	461	468	472	0.7	7.4
Furniture	**865**	**939**	**945**	**961**	**952**	**-1.0**	**9.9**
Household furniture and appliance stores	681	733	736	748	739	-1.2	8.5
Household furnishings stores	184	206	210	213	213	-0.4	15.3
Automotive	**6,593**	**7,054**	**7,052**	**7,140**	**7,056**	**-1.2**	**7.0**
Motor vehicle and recreational vehicle dealers	4,281	4,626	4,561	4,586	4,546	-0.9	6.2
Gasoline service stations	1,342	1,392	1,399	1,394	1,394	0.0	3.9
Automotive parts, accessories and services	970	1,036	1,091	1,160	1,115	-3.8	15.0
General merchandise stores	**1,928**	**2,038**	**2,036**	**2,090**	**2,100**	**0.5**	**8.9**
Retail stores not elsewhere classified	**1,954**	**1,863**	**1,995**	**1,986**	**1,952**	**-1.7**	**-0.1**
Other semi-durable goods stores	594	625	663	666	639	-4.1	7.5
Other durable goods stores	460	465	457	459	453	-1.3	-1.5
All other retail stores not elsewhere classified	900	774	876	861	860	-0.1	-4.5
Total, retail sales	**17,794**	**18,624**	**18,854**	**19,033**	**18,883**	**-0.8**	**6.1**
Total excluding motor vehicle and recreational vehicle dealers	**13,513**	**13,998**	**14,293**	**14,447**	**14,336**	**-0.8**	**6.1**
Department store type merchandise	**5,904**	**6,207**	**6,258**	**6,348**	**6,292**	**-0.9**	**6.6**
Provinces and territories							
Newfoundland	287	296	294	293	297	1.4	3.5
Prince Edward Island	80	82	81	81	82	1.7	3.2
Nova Scotia	561	592	579	582	581	-0.1	3.6
New Brunswick	442	447	434	436	431	-1.2	-2.6
Quebec	4,175	4,466	4,561	4,674	4,494	-3.8	7.6
Ontario	6,491	6,786	6,622	6,762	6,818	0.8	5.0
Manitoba	635	667	682	697	702	0.6	10.5
Saskatchewan	581	623	618	629	610	-3.2	4.9
Alberta	1,874	2,044	2,107	2,109	2,110	0.1	12.6
British Columbia	2,605	2,555	2,808	2,702	2,691	-0.4	3.3
Yukon	23	25	25	24	25	1.5	9.0
Northwest Territories	41	41	42	44	42	-4.0	3.2

r *Revised figures.*
p *Preliminary figures.*

■

Canadian international merchandise trade

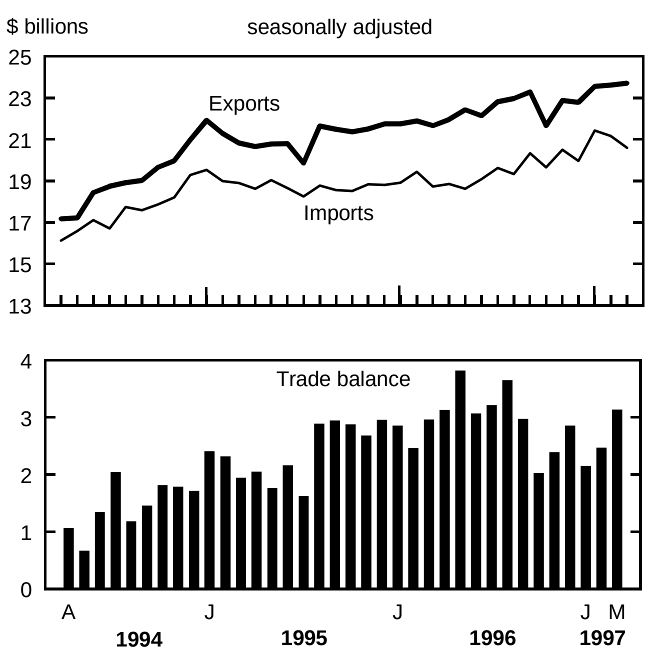
March 1997

After rising sharply in January (+3.4%) and holding firm in February, exports posted a modest increase of 0.4% in March, levelling off at $23.7 billion. Industrial goods and agricultural products made solid gains in the month: however, growth in total exports was tempered by reduced sales of energy products and automobiles — especially to the United States. So far in 1997, exports have increased to all of Canada's major trading partners except the European Union.

Imports declined for a second consecutive month in March, dipping 2.7% to $20.6 billion. The decline reflected weaker imports for most commodity sectors. However, despite the slowdown, total imports remained 3.2% above the most recent low in December. While imports from the United States and Japan advanced during this period, there were declines from all other trading partners.

March's drop in imports, combined with slightly stronger exports, pushed the merchandise trade surplus to $3.1 billion from $2.5 billion in February.

Exports, imports and trade balance



> ***Note to readers***
>
> *Merchandise trade is one component of the current account of Canada's balance of payments, which also includes trade in services. In the fourth quarter of 1996, the overall merchandise trade surplus of $7.2 billion contrasted with a current account deficit of $1.7 billion.*

Mixed movements in exports

Increased demand from U.S. manufacturers helped boost industrial goods exports (+13.2%) in March, as 21 of 27 commodity groupings showed improvement over February. While a sharp rise in the volatile precious metals group was a major contributor to the gain, sales of metal ores, chemicals, plastics, and base metals were also strong. Reflecting increased demand in construction and automotive industries, base metal exports continued to benefit from higher prices — especially aluminum and copper.

In agricultural exports (+6.2%), gains were posted for most commodities, led by Japanese purchases of canola and sales of meat and vegetable products to the United States. Wheat and fish were among the few commodities that fell back in the month; fish sales finally slowed after a four-month growth spurt.

Exporters of forestry products increased their shipments for a second consecutive month in March (+0.1%). A second round of gains for pulp and paper and fabricated wood products were behind the increase, which was partially offset by lower sales of lumber to Japan — a weaker yen may have contributed to the dip.

Following February's record level, machinery exports dipped in March (-0.3%). While U.S.-bound shipments of industrial and agricultural machinery set further records, offsetting declines were posted for telecommunications equipment, office machines and aircraft.

Exports slipped slightly as well in the automotive sector (-0.6%). Although parts exports increased in line with U.S. auto production, reduced shipments of cars and trucks more than offset the gains. Despite the decline, truck exports in March stood nearly 14% above December's level, in part reflecting the popularity of pick-ups and sport utility vehicles south of the border.

Continuing a trend that began in December, energy imports slowed another 8.5% in March after falling 5.2% in February. With demand still hampered by unseasonably mild weather in the United States, crude oil and natural gas exports fell in both price and volume. Coal exports fell as well, as sales to Japan dropped for a second month in a row.

Imports slower for most sectors

Following two months of sustained high levels, imports of machinery and equipment fell marginally in March (-1.9%). Although the largest declines were registered for industrial machinery, imports of special equipment and tools, and communications equipment continued to ease. Helping to mitigate these negative movements was an influx of civil airliners and continued gains in farm equipment purchases; in 1996, 75% of farm machinery investment was met through imports.

Energy imports fell for a second consecutive month in March as purchases in all major commodity groupings lost ground.

Elsewhere, industrial goods and consumer imports both retreated from record highs in February. Declines were fairly widespread for industrial goods, affecting 10 of 17 product groups. Despite the downturn (-1.3%), industrial goods imports in March were 7% higher than in December. Meanwhile consumer goods, which had gained 6% since December, capped the first quarter with a slight drop (-1%).

Automotive products helped offset some of March's import slippage, moving ahead by 0.6%. Reflecting strong domestic demand, imports of cars and trucks both continued to grow in the month. Imports of parts, meanwhile, decreased for a second consecutive month, in the wake of January's near-record surge.

Revisions

Merchandise trade data are revised on a continuing basis for every month of the current year. Factors that create the need for revisions include: the late receipt of import and export documentation, incorrect information on customs documents, replacement of estimated figures with actual values once available, changes to classification of merchandise based on more current information, and updated seasonal adjustments. Revised data can be obtained by accessing the relevant CANSIM matrices.

Available on CANSIM: matrices 3611-3616, 3618-3629, 3651, 3685-3713, 3718-3720 and 3887-3913.

This release contains a summary of the merchandise trade data, which will be available shortly in *Canadian international merchandise trade* (65-001-XPB, $19/$188). The publication will include tables by commodity and country on a customs basis. Current account data, which incorporate merchandise trade statistics, services transactions, investment income and transfers, are available on a quarterly basis in *Canada's balance of international payments* (67-001-XPB, $38/$124). See *How to order publications*.

For more timely receipt of the merchandise trade data, a fax service is available on the morning of release.

For further information on this release, contact Suzie Carpentier (613-951-9647; 1 800 294-5583), Marketing and Client Services Section, International Trade Division.

Merchandise trade of Canada

	Jan. 1997	Feb. 1997	Mar. 1997	Jan. to Feb. 1997	Feb. to Mar. 1997	Jan. to Mar. 1996	Jan. to Mar. 1997	Jan. to Mar. 1996 to Jan. to Mar. 1997	Mar. 1996 to Mar. 1997
	seasonally adjusted, $ current								
	$ millions			% change		$ millions		% change	
Principal trading partners									
Exports									
United States	19,296	19,395	19,492	0.5	0.5	52,438	58,184	11.0	12.8
Japan	1,046	970	995	-7.3	2.6	2,333	3,011	29.1	25.0
European Union	1,146	1,176	1,138	2.6	-3.2	4,149	3,460	-16.6	-15.0
Other OECD countries [1]	371	322	394	-13.2	22.4	1,273	1,087	-14.6	-23.9
All other countries	1,697	1,754	1,691	3.4	-3.6	5,104	5,141	0.7	-2.4
Total	23,556	23,617	23,710	0.3	0.4	65,297	70,883	8.6	9.5
Imports									
United States	16,273	16,156	15,917	-0.7	-1.5	43,176	48,346	12.0	12.7
Japan	699	746	719	6.7	-3.6	1,914	2,164	13.1	13.8
European Union	1,804	1,637	1,734	-9.3	5.9	4,823	5,175	7.3	5.7
Other OECD countries [1]	746	753	660	0.9	-12.4	2,247	2,159	-3.9	-8.3
All other countries	1,903	1,873	1,564	-1.6	-16.5	4,913	5,340	8.7	-2.7
Total	21,425	21,164	20,595	-1.2	-2.7	57,073	63,184	10.7	10.0
Balance									
United States	3,023	3,239	3,575	...	...	9,262	9,838	...	...
Japan	347	224	276	...	...	419	847	...	...
European Union	-658	-461	-596	...	...	-674	-1,715	...	...
Other OECD countries [1]	-375	-431	-266	...	...	-974	-1,072	...	...
All other countries	-206	-119	127	...	...	191	-199	...	...
Total	2,131	2,453	3,115	...	...	8,224	7,699	...	...
Principal commodity groupings [2]									
Exports									
Agricultural and fishing products	1,894	1,795	1,907	-5.2	6.2	5,269	5,596	6.2	4.3
Energy products	2,948	2,794	2,557	-5.2	-8.5	6,234	8,299	33.1	22.5
Forestry products	2,910	3,051	3,053	4.8	0.1	9,164	9,013	-1.6	1.6
Industrial goods and materials	4,230	4,126	4,671	-2.5	13.2	12,203	13,027	6.8	8.9
Machinery and equipment	4,822	5,037	5,023	4.5	-0.3	13,865	14,882	7.3	12.6
Automotive products	5,931	5,864	5,826	-1.1	-0.6	15,913	17,621	10.7	16.6
Other consumer goods	705	725	736	2.8	1.5	1,983	2,166	9.2	14.3
Special transactions trade [3]	968	966	966	-0.2	0.0	2,732	2,900	6.1	3.9
Imports									
Agricultural and fishing products	1,231	1,223	1,237	-0.6	1.1	3,447	3,691	7.1	5.6
Energy products	1,266	973	707	-23.1	-27.3	2,138	2,946	37.8	16.3
Forestry products	181	187	192	3.3	2.7	468	560	19.7	23.1
Industrial goods and materials	4,109	4,278	4,222	4.1	-1.3	11,115	12,609	13.4	16.1
Machinery and equipment	6,957	6,935	6,805	-0.3	-1.9	19,300	20,696	7.2	5.3
Automotive products	4,816	4,674	4,701	-2.9	0.6	12,344	14,192	15.0	23.5
Other consumer goods	2,255	2,307	2,283	2.3	-1.0	6,439	6,846	6.3	6.0
Special transactions trade [3]	630	623	634	-1.1	1.8	1,657	1,887	13.9	12.6

... *Figures not appropriate or not applicable.*
[1] *Includes Australia, Iceland, Mexico, New Zealand, Norway, Switzerland and Turkey.*
[2] *Figures not adjusted to balance-of-payments basis.*
[3] *Mainly low-valued transactions, value of repairs to equipment, goods returned to country of origin.*

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OTHER RELEASES

Export and import price indexes
March 1997

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 1997 for the five commodity sections and the major commodity groups (62 exports and 61 imports).

Current- and fixed-weighted U.S. price indexes (1986=100) are also available on a custom basis. Price indexes are listed from January 1986 to March 1997. Included with the U.S. commodity indexes are the 10 all countries and U.S. only standard international trade classification (SITC) section indexes. Indexes for the five commodity sections and the major commodity groups are also now available on a custom basis.

Available on CANSIM: matrices 3611-3616, 3618-3629, 3651 and 3685.

The March 1997 issue of *Canadian international merchandise trade* (65-001-XPB, $19/$188) will be available shortly. See *How to order publications*.

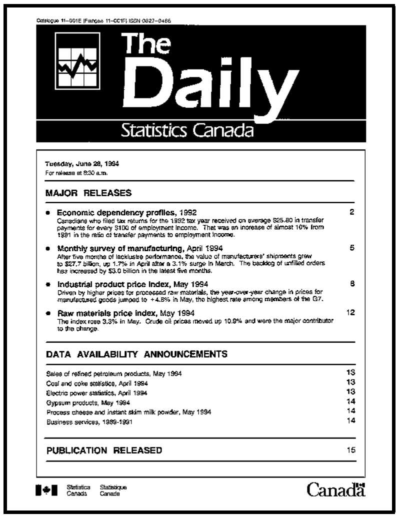
For further information on this release, contact Denis Pilon (613-951-4808), Price Index Unit, International Trade Division. ■

Air charter statistics
Third quarter 1996 (preliminary)

Air charter data for the third quarter 1996 are now available.

The May issue of the *Aviation statistics centre service bulletin* (51-004-XPB, $11/$105) will be available shortly. See *How to order publications*.

For further information on this release, contact Francesca Thibeault (819-997-6173), Aviation Statistics Centre, Transportation Division. ■


Catalogue 11-001E (Français 11-001F) ISSN 0827-0465

The Daily

Statistics Canada

Tuesday, June 28, 1994
For release at 8:30 a.m.

MAJOR RELEASES

- **Economic dependency profiles,** 1992 — 2
  Canadians who filed tax returns for the 1992 tax year received on average $25.80 in transfer payments for every $100 of employment income. That was an increase of almost 10% from 1991 in the ratio of transfer payments to employment income.
- **Monthly survey of manufacturing,** April 1994 — 5
  After five months of lacklustre performance, the value of manufacturers' shipments grew to $27.7 billion, up 1.7% in April after a 3.1% surge in March. The backlog of unfilled orders has increased by $3.0 billion in the latest five months.
- **Industrial product price index,** May 1994 — 8
  Driven by higher prices for processed raw materials, the year-over-year change in prices for manufactured goods jumped to +4.8% in May, the highest rate among members of the G7.
- **Raw materials price index,** May 1994 — 12
  The index rose 3.3% in May. Crude oil prices moved up 10.9% and were the major contributor to the change.

DATA AVAILABILITY ANNOUNCEMENTS

Sales of refined petroleum products, May 1994	13
Coal and coke statistics, April 1994	13
Electric power statistics, April 1994	13
Gypsum products, May 1994	14
Process cheese and instant skim milk powder, May 1994	14
Business services, 1989-1991	14

PUBLICATION RELEASED — 15

Statistics Canada Statistique Canada — Canada

Statistics Canada's official release bulletin

Catalogue 11-001E.

Published each working day by the Communications Division, Statistics Canada,
10-H, R.H. Coats Bldg., Tunney's Pasture, Ottawa, Ontario K1A 0T6.

To receive *The Daily* from the Internet, send an E-mail message to listproc@statcan.ca. Leave the subject line blank. In the body of the message, type "subscribe daily firstname lastname".

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