



The Daily

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Retail sales in November recovered about half the loss sustained in October, advancing 0.6% to reach \$22.0 billion. Sales gains were fuelled primarily by the automotive sector.
 - **Composite Index, December 1999** 6
The growth of the leading index rose to 0.5% in December, after downward-revised gains of 0.3% in October and November. The financial market components contributed the most to December's increase.
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MAJOR RELEASES

Retail trade

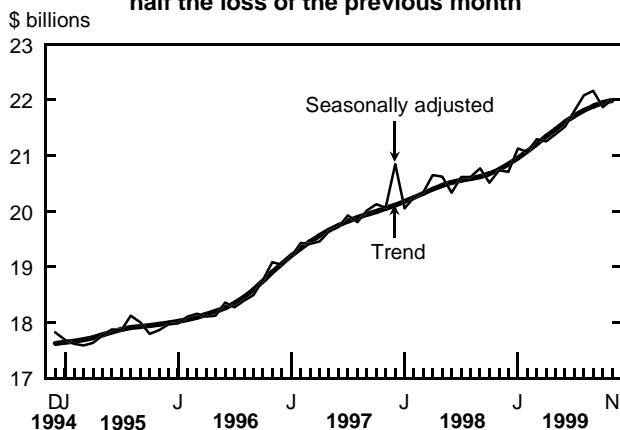
November 1999

Retail sales in November recovered about half the loss sustained in October, advancing 0.6% to \$22.0 billion. Sales gains were fuelled primarily by the automotive sector. November's increase followed a 1.3% decline in October, which ended a series of five consecutive monthly gains.

Excluding sales by motor and recreational vehicle dealers, total retail sales declined 0.5% in November. Diminishing sales were noted in general merchandise stores, furniture stores and clothing stores.

For the period from January to November, retail sales advanced 5.4% compared with the first 11 months of 1998. Overall, retailers have enjoyed increasing sales since the fall of 1998 after a period of weaker sales in the spring and summer of that year. Previously, they had experienced rising sales since early 1996.

November's retail sales recovered about half the loss of the previous month



Auto sector back on the road

The automotive sector bounced back from a 4.7% decline in October with a 3.1% gain in November. Sales by motor and recreational vehicle dealers, the largest component of this sector, increased 3.9% in November, following a 7.0% decline in October. Consumer confidence, sales incentives and the availability of popular models are among the factors affecting sales in this industry.

Overall, retailers in the automotive sector have enjoyed strong sales advances since the fall

of 1998 after more modest increases that started in the spring of 1997.

Drug stores posted the second largest percentage increase in sales in November (+1.4%). This gain added strength to drug store sales, which had been increasing slowly since the spring following strong sales in the first three months of 1999. Previously, sales in drug stores had been on a downturn in the last half of 1998 after generally increasing since mid-1997.

Food stores (+0.5%) also experienced rising sales in November. Overall, sales in food stores have been increasing since the spring of 1996.

Near record drop in department store sales

In November, department stores were almost entirely responsible for the decline observed in the general merchandise sector (-4.9%). Sales in department stores fell 8.2%, marking the largest monthly decline since April 1994 (-8.3%). These record declines can be associated with the closure of department store chains — most of Eaton's stores were closed in November 1999, and Woolco stores were sold to Wal-Mart in early 1994.

Prior to November's retreat, department store sales had been advancing since early 1996, except for a period of diminishing sales in the spring of 1998.

Consumers also reduced spending in furniture stores (-2.6%) and clothing stores (-1.1%) in November. These declines followed significant sales gains in October for both store types. Sales in both furniture and clothing stores have generally been rising since early 1996.

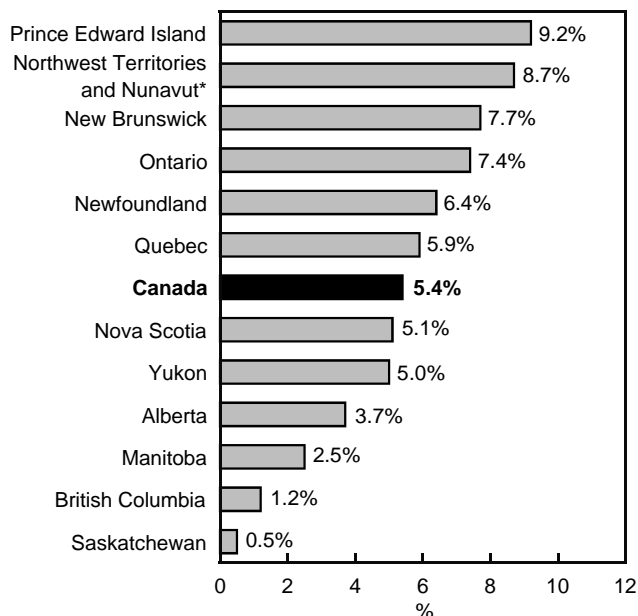
Retailers in Atlantic and Central Canada post good year-to-date results

Retail sales advanced in all provinces in November, except in British Columbia (-0.2%) and Nova Scotia (unchanged). After reporting significant declines in October, retailers in Saskatchewan (+3.2%) and Manitoba (+2.1%) posted the largest sales increases. Retail sales in these two provinces have shown little progress in the last two years.

A comparison of year-to-date sales with the same period in 1998 shows considerable differences by province. All provinces east of Manitoba, with the exception of Nova Scotia, posted increases above the national average. The Northwest Territories and Nunavut combined also posted strong sales in the first 11 months of 1999.

Cumulative retail sales by province and territory

(First 11 months of 1999 compared with the same period in 1998)



*These territories were combined because separate data have only been available since January 1999.

Related indicators for December

Total employment advanced for a fourth consecutive month in December (+0.3%) on the strength of full-time jobs. Industry sources suggested a strong increase in the number of new motor vehicles sold in December. The number of housing starts remained essentially unchanged compared with November. Overall, housing starts have been increasing since the summer of 1998 after a period of retreat in the spring of that year.

Available on CANSIM: 2399 and 2400 (main matrices), 2299, 2397, 2398, 2401-2416 and 2418-2420.

The November 1999 issue of *Retail trade* (63-005-XPB, \$21/\$206; 63-005-XIB, \$16/\$155) will be available shortly. See *How to order publications*.

For more information, contact the client services unit (613-951-3549 or 1 877 421-3067; retailinfo@statcan.ca). To enquire about the concepts, methods and data quality of this release, contact Paul Gratton (613-951-3541; gratpau@statcan.ca), Retail Trade Section, Distributive Trades Division. □

Retail sales

	Nov. 1998	Aug. 1999 ^r	Sept. 1999 ^r	Oct. 1999 ^r	Nov. 1999 ^p	Oct. to Nov. 1999	Nov. to Nov. 1999
seasonally adjusted							
	\$ millions					% change	
Food	4,846	4,919	4,923	4,933	4,959	0.5	2.3
Supermarkets and grocery stores	4,489	4,555	4,555	4,567	4,590	0.5	2.2
All other food stores	357	364	367	366	370	1.0	3.5
Drug and patent medicine stores	1,080	1,120	1,125	1,125	1,141	1.4	5.7
Clothing	1,182	1,201	1,169	1,215	1,201	-1.1	1.6
Shoe stores	134	131	129	138	131	-5.1	-2.3
Men's clothing stores	133	133	127	133	132	-0.5	-1.0
Women's clothing stores	373	377	360	377	381	0.9	2.2
Other clothing stores	542	560	553	567	558	-1.7	2.9
Furniture	1,086	1,154	1,142	1,199	1,168	-2.6	7.6
Household furniture and appliance stores	867	939	928	977	942	-3.6	8.6
Household furnishings stores	219	215	213	222	227	1.9	3.4
Automotive	7,921	8,753	8,855	8,439	8,701	3.1	9.8
Motor and recreational vehicle dealers	5,430	5,989	6,081	5,655	5,878	3.9	8.3
Gasoline service stations	1,273	1,511	1,516	1,534	1,538	0.3	20.7
Automotive parts, accessories and services	1,218	1,252	1,258	1,251	1,286	2.8	5.5
General merchandise stores	2,341	2,562	2,579	2,561	2,435	-4.9	4.0
Retail stores not elsewhere classified	2,279	2,373	2,369	2,396	2,401	0.2	5.3
Other semi-durable goods stores	712	734	714	721	727	0.7	2.1
Other durable goods stores	571	583	581	589	579	-1.8	1.3
All other retail stores not elsewhere classified	996	1,057	1,074	1,085	1,095	0.9	10.0
Total, retail sales	20,735	22,082	22,161	21,869	22,008	0.6	6.1
Total excluding motor and recreational vehicle dealers	15,305	16,092	16,080	16,214	16,130	-0.5	5.4
Provinces and territories							
Newfoundland	334	344	353	347	352	1.6	5.5
Prince Edward Island	86	97	100	98	99	0.7	14.5
Nova Scotia	646	677	680	681	681	0.0	5.4
New Brunswick	496	557	549	543	546	0.6	10.1
Quebec	4,834	5,058	5,102	5,035	5,075	0.8	5.0
Ontario	7,836	8,582	8,473	8,426	8,475	0.6	8.2
Manitoba	735	768	775	736	751	2.1	2.2
Saskatchewan	627	659	653	629	649	3.2	3.5
Alberta	2,347	2,477	2,563	2,487	2,496	0.3	6.3
British Columbia	2,725	2,788	2,838	2,812	2,807	-0.2	3.0
Yukon	26	27	28	27	27	3.0	4.5
Northwest Territories	..	33	33	34	34	-0.8	..
Nunavut	..	14	15	15	15	1.9	..

^r Revised figures.

^p Preliminary figures.

.. Figures not available.

Retail sales

	Nov. 1998	Oct. 1999 ^r	Nov. 1999 ^p	Nov. 1998 to Nov. 1999
	unadjusted			
	\$ millions			% change
Food	4,520	5,017	4,675	3.4
Supermarkets and grocery stores	4,180	4,652	4,326	3.5
All other food stores	340	366	349	2.6
Drug and patent medicine stores	1,056	1,122	1,122	6.3
Clothing	1,311	1,312	1,333	1.7
Shoe stores	150	159	144	-4.3
Men's clothing stores	159	139	160	1.0
Women's clothing stores	395	400	410	3.8
Other clothing stores	607	615	619	2.0
Furniture	1,181	1,242	1,303	10.3
Household furniture and appliance stores	944	1,010	1,044	10.6
Household furnishings stores	237	232	259	9.1
Automotive	7,498	8,289	8,480	13.1
Motor and recreational vehicle dealers	4,926	5,441	5,532	12.3
Gasoline service stations	1,254	1,593	1,520	21.2
Automotive parts, accessories and services	1,318	1,255	1,428	8.4
General merchandise stores	2,864	2,683	2,957	3.3
Retail stores not elsewhere classified	2,244	2,317	2,359	5.1
Other semi-durable goods stores	750	691	775	3.4
Other durable goods stores	560	534	553	-1.2
All other retail stores not elsewhere classified	935	1,091	1,031	10.3
Total, retail sales	20,673	21,982	22,229	7.5
Total excluding motor and recreational vehicle dealers	15,747	16,541	16,697	6.0
Provinces and territories				
Newfoundland	343	347	369	7.6
Prince Edward Island	84	96	96	14.2
Nova Scotia	655	679	697	6.5
New Brunswick	499	551	557	11.5
Quebec	4,713	5,063	5,017	6.4
Ontario	7,943	8,417	8,691	9.4
Manitoba	736	754	760	3.2
Saskatchewan	633	662	667	5.4
Alberta	2,352	2,525	2,543	8.1
British Columbia	2,651	2,814	2,762	4.2
Yukon	23	25	25	6.8
Northwest Territories	..	34	31	..
Nunavut	..	15	14	..

^r Revised figures.

^p Preliminary figures.

.. Figures not available.



Composite Index

December 1999

The growth of the leading index rose to 0.5% in December, after downward-revised gains of 0.3% in October and November. The financial market components contributed the most to December's increase. Elsewhere, household demand remained uneven.

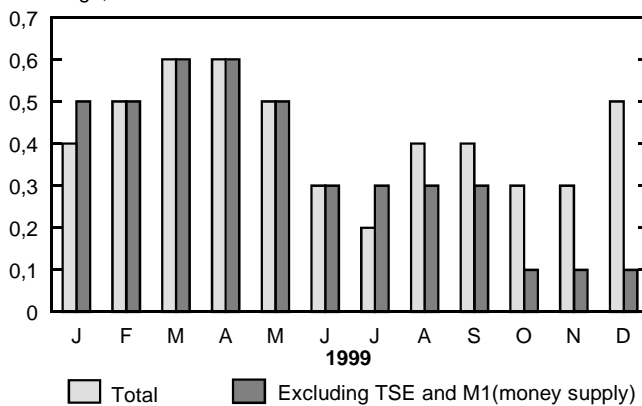
The stock market ended the year by leaping ahead, led notably by technology issues. Meanwhile, the money supply accelerated, partly because of the demand for liquidity before clocks turned over into the year 2000. Without these two financial market components, the overall composite index would have been essentially unchanged since October. Financial markets also led the recent advances in the U.S. leading indicator.

Business demand continued to improve, as reflected in a gain of 50 000 new business services jobs in the last six months. New orders for durable goods, notably for electronic products, also posted another sharp gain.

Household demand lost some of its recent force, particularly in sales of large vehicles after the upturn in gasoline prices. Housing recorded a third straight drop, which steepened due to slow sales. However, the strength of the labour market at the end of 1999 is an encouraging indicator for a rise in demand.

Composite Index excluding the financial components

% change, smoothed



Available on CANSIM: matrix 191.

For more information on the economy, the January issue of *Canadian economic observer* (11-010-XPB, \$23/\$227) is now available. See *How to order publications*.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Francine Roy (613-951-3627), Current Economic Analysis Group.

□

Composite Index

	July 1999 ^r	August 1999 ^r	September 1999 ^r	October 1999 ^r	November 1999 ^r	December 1999	Last month of data available
							% change
Composite leading indicator (1981=100)	215.4	216.2	217.1	217.8	218.5	219.6	0.5
Housing index (1981=100) ¹	133.8	134.9	135.7	135.3	135.0	134.4	-0.4
Business and personal services employment ('000)	2,320	2,304	2,291	2,282	2,280	2,289	0.4
TSE 300 stock price index (1975=1,000)	6,835	6,928	6,987	7,058	7,161	7,391	3.2
Money supply, M1 (\$ millions, 1981) ²	41,148	41,187	41,511	41,761	42,078	42,634	1.3
U.S. composite leading indicator (1967=100) ³	229.2	229.7	230.1	230.5	230.7	230.9	0.1
Manufacturing							
Average workweek (hours)	38.8	38.8	38.8	38.6	38.4	38.2	-0.5
New orders, durables (\$ millions, 1981) ⁴	16,746	16,749	16,802	16,957	17,183	17,395	1.2
Shipments/inventories of finished goods ⁴	1.69	1.70	1.72	1.73	1.74	1.74	0.00 ⁵
Retail trade							
Furniture and appliance sales (\$ millions, 1981) ⁴	1,433	1,446	1,460	1,475	1,484	1,496	0.8
Other durable goods sales (\$ millions, 1981) ⁴	4,771	4,778	4,796	4,832	4,880	4,891	0.2
Unsmoothed composite	215.2	219.2	219.7	218.0	220.2	223.6	1.5

^r Revised figures.

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 reflect data published in the month indicated, but the figures themselves refer to data for the month immediately preceding.

⁴ The figures in this row reflect data published in the month indicated, but the figures themselves refer to data for two preceding months.

⁵ Difference from previous month.



OTHER RELEASES

Employment Insurance

November 1999 (preliminary)

An estimated 501,159 Canadians received regular Employment Insurance (EI) benefits in November, down 2.8% from October. After a relatively stable first half in 1999, the number of regular beneficiaries has declined for three consecutive months.

Led by Newfoundland (-8.5%), most provinces recorded monthly decreases. The only increases occurred in the Northwest Territories and Nunavut as well as Manitoba. Compared with a year earlier, the number of beneficiaries receiving regular benefits was down 7.9% in November.

Regular benefit payments decreased 9.9% in November to \$600.6 million while claims received decreased 6.9% to 205,410.

Number of beneficiaries receiving regular benefits November 1999

	Nov. 1999 ^P	Oct. to Nov. 1999	Nov. to Nov. 1998
seasonally adjusted			
		% change	
Canada	501,159	-2.8	-7.9
Newfoundland	33,240	-8.5	3.8
Prince Edward Island	8,180	-3.3	-6.4
Nova Scotia	29,450	-1.1	-1.5
New Brunswick	32,990	-3.0	-6.0
Quebec	173,990	-3.3	-4.9
Ontario	106,160	-0.3	-12.4
Manitoba	13,020	5.6	-2.8
Saskatchewan	10,870	-3.7	-14.1
Alberta	30,260	-2.0	-15.1
British Columbia	58,790	-0.1	-12.8
Yukon Territory	1,060	0.0	-14.4
Northwest Territories and Nunavut	1,230	9.8	-2.4

^P Preliminary figures.

Note: A new production system and methodology was introduced starting with October 1999 data. Changes include the use of geographic coding from the 1996 Census and the latest postal code file, the inclusion of reimbursements to the EI program for more accurate data on total benefits paid, revised seasonal factors and availability of raw data from March 1999 for the number of beneficiaries for the new Northwest Territories and Nunavut. As well, transfers to provinces are now published separately.

The number of beneficiaries is a measure of all persons who received EI benefits for the week

containing the 15th of the month. The regular benefit payments series measures the total of all monies received by individuals for the entire month. These different reference periods must be considered when comparisons are done between the series.

Employment Insurance statistics

	Nov. 1998	Oct. 1999	Nov. 1999	Oct. to Nov. 1999	Nov. to Nov. 1998
seasonally adjusted					
				% change	
Regular beneficiaries	543,080	515,411 ^P	501,159 ^P	-2.8	-7.9
Regular benefits paid (\$ millions)	682.7	666.6	600.6	-9.9	-12.0
Claims received ('000)	232.7	220.6	205.4	-6.9	-11.7
unadjusted for seasonality					
				% change	
All beneficiaries ('000)	674.5	554.0 ^P	623.2 ^P	12.5	-7.6
Regular beneficiaries ('000)	481.4	380.6 ^P	438.5 ^P	15.2	-8.9
Claims received ('000)	312.5	231.0	285.5	23.4	-8.6
Payments (\$ millions)	905.6	755.9	897.4	18.7	-0.9
Year-to-date (January to November)					
				1998	1999 to 1999
				% change	
Claims received ('000)			2,522.5	2,340.2	-7.2
Payments (\$ millions)			10,660.5	10,841.1	1.7

^P Preliminary figures.

Note: All beneficiaries includes all claimants receiving regular benefits (e.g., due to layoff) or special benefits (e.g., due to illness).

The *Employment Insurance Act* allows each province or administrative region of Human Resource Development Canada to have certain autonomy in the application of administrative procedures regarding renewal claims. Users must consider that changes in levels from month to month may be affected by different administrative procedures regarding renewal claims from one province or region to another.

Available on CANSIM: matrices 26 (series 1.6), 5700-5717, 5735 and 5736.

For more information, or to enquire about the concepts, methods and data quality of this release, contact Robert Keay (613-951-4090; 613-951-4087; labour@statcan.ca), Labour Statistics Division. ■

Oil and gas extraction

1999 (preliminary)

Natural gas production rose 1.8% in 1999 to 163.4 million cubic metres as a result of sustained strong demand from the United States and increasing domestic sales. Crude oil and equivalent production declined 4.6%, due to sharply lower exports to the United States. Synthetic crude oil production (including crude bitumen) has increased sharply in the last 10 years. In 1999, synthetic crude accounted for 26.9% of total crude oil and equivalent production.

During the first 10 months of 1999, exports of natural gas increased 4.5% compared with the same period in 1998, largely as a result of increases in pipeline capacity to the American mid-west and California markets. More than 55% of Canada's annual production is now exported to the United States.

Exports of crude oil were down sharply in 1999, decreasing 9.1% in the first 10 months of 1999 compared with the same period in 1998. The decline reflects decisions by Canadian producers to curtail production due to weak prices in 1998 and the first half of 1999, rather than lower demand by U.S. refineries. Despite the decline in crude oil exports, Canada remains one of the major suppliers of oil to the United States along with Mexico, Saudi Arabia and Venezuela.

An estimated \$18.9 billion of crude oil and equivalent hydrocarbons was produced in 1999. This represents a dramatic 46.0% increase from 1998, the result of much higher crude oil prices during the second half of 1999. The value of natural gas production increased 25.7% to an estimated \$13.7 billion.

Oil and gas extraction: Volume and value of marketable production

	1998	1999	1998 to 1999 % change
Crude oil and equivalent¹			
Volume (000's m ³)	128 401.1	122 477.5	-4.6
Value (\$ millions)	12,940.1	18,894.0	46.0
Natural gas			
Volume (000's m ³)	160 514.5	163 384.4	1.8
Value (\$ millions)	10,893.5	13,696.0	25.7
Natural gas by-products²			
Volume (000's m ³)	26 665.5	26 074.6	-2.2
Value (\$ millions)	1,763.1	2,347.3	33.1

¹ Includes pentanes plus.

² Excludes pentanes plus and elemental sulphur.

For more information, or to enquire about the concepts, methods and data quality of this release, contact Gary Smalldridge (613-951-3567; smalgar@statcan.ca) or Denis Ouellette (613-951-5452;

ouelden@statcan.ca), Energy Section, Manufacturing, Construction and Energy Division. ■

Provincial and territorial government finance: Assets and liabilities

March 31, 1998

At March 31, 1998, the net debt (defined as the excess of liabilities over financial assets) of provincial and territorial governments reached \$245.1 billion, an increase of \$3.4 billion (+1.4%) over March 31, 1997. The financial assets stood at \$198.0 billion, while total liabilities reached \$443.2 billion.

These statistics are based on the actual data released in the provincial and territorial governments' Public Accounts dated March 31, 1998 and converted to Statistics Canada's Financial Management System.

Note: The Financial Management System (FMS) provides a standardized presentation of government accounting for the federal, provincial and local governments in Canada. The individual governments' accounting systems are not directly comparable because their policies and structures differ. The FMS adjusts data from governments' Public Accounts and other records to provide detailed data that permit inter-government comparisons as well as compatible national aggregates that are consistent over time. In other words, FMS statistics may not accord with the figures published in government financial statements. A reconciliation statement of the two presentations is available.

Available on CANSIM: matrices 3201-3213.

Data are available through custom and special tabulation. For more information on the products or services of the Public Institutions Division, contact Jo-Anne Thibault (613-951-0767; jo-anne.thibault@statcan.ca).

For more information, or to enquire about the concepts, methods or data quality of this release, contact A.J. Gareau (613-951-1826) or Robert Larocque (613-951-1836), Public Institutions Division. ■

Monthly farm product prices

1999

Monthly farm product prices for 1999 are now available.

For more information, or to enquire about the concepts, methods or data quality for this release, contact Bernie Rosien (613-951-2441; fax: 613-951-3868), Farm Income and Prices Section, Agriculture Division. ■

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
• Urban transit, 1995 Despite the emphasis on taking urban transit, Canadians are using it less and less. In 1995, each Canadian took an average of about 40 trips on some form of urban transit, the lowest level in the past 25 years.	2
• Productivity, hourly compensation and unit labour cost, 1995 Growth in productivity among Canadian businesses was relatively weak, equal to 1990, accompanied by sluggish gains in employment and slow economic growth during the year.	4

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PUBLICATIONS RELEASED

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