



The Daily

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Releases

Retail trade, August 2006	2
Retailers posted widespread gains in August, led by a second consecutive advance in new car dealer sales.	
Deliveries of major grains, September 2006	6
Crushing statistics, September 2006	6
Cereals and oilseeds review, August 2006	6
Crude oil and natural gas production, August 2006	6
Production and disposition of tobacco products, September 2006	6

New products	7
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Releases

Retail trade

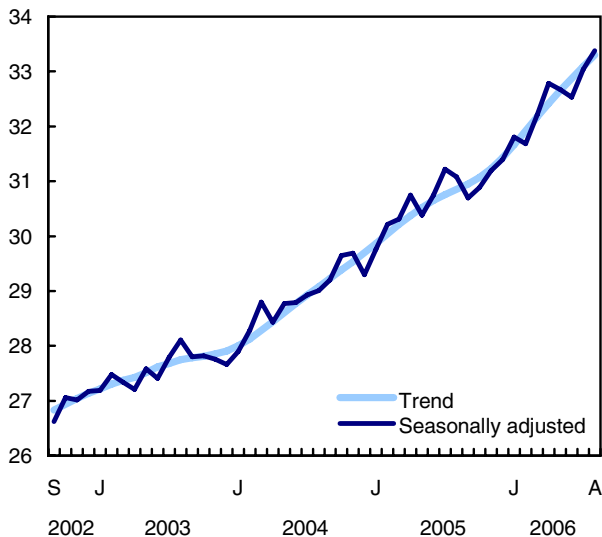
August 2006

Retailers posted widespread gains in August, led by a second consecutive advance in new car dealer sales. In total, retail sales advanced 1.0% to \$33.4 billion in August. Except for three months of slight declines, retail sales have been growing strongly so far in 2006.

Despite lower sales at gasoline stations, sales in the automotive sector (+1.5%) continued to surge ahead, on the strength of sales at new car dealers. Retail sales in the building and outdoor home supplies sector increased by 1.4% in August. Sales in this sector have been generally on the rise with only one month of decline since November 2005. Furniture, home furnishings and electronic stores' sales advanced 1.3%, continuing four consecutive months of sales gains.

Widespread sales gains in August

\$ billions



General merchandise stores (+1.0%), clothing and accessories stores (+1.0%), food and beverage stores (+0.6%), and pharmacies and personal care stores (+0.6%) also posted higher sales.

Only one sector, miscellaneous retailers (-0.6%), experienced a sales decline in August. The miscellaneous category includes retailers such as office supply, sporting goods, hobby, music and book stores.

Excluding sales by dealers of new, used and recreational vehicles and auto parts, retail sales rose by 0.4% from July. Once price changes were taken into account, total retail sales grew by 1.1%.

Retail sales continue to grow, with the automotive sector leading the way

Sales at new car dealers continued to grow (+4.1%) in August. According to the New Motor Vehicle Sales Survey, truck sales (which include minivans, sport-utility vehicles, light and heavy trucks, vans and buses) accounted for 80% of the increase in new motor vehicle sales in August, due to incentives targeted at larger vehicles. After a period of relative stability, in the wake of dealer incentives during the summer of 2005, new car dealer sales picked up in July, while August sales levels actually surpassed the July 2005 peak. However, based on preliminary data from the automotive industry, the number of new motor vehicles sold in September is estimated to have slipped about 4%, due to a fallback in truck sales. Sales of new motor vehicles account for approximately 64% of new car dealers' sales.

Gasoline station sales fell by 1.7% following a 3.2% increase in July. Over the long run, gasoline station sales have been on the rise since April 2003 with higher prices playing a large part in this increase.

Used and recreational motor vehicles and parts dealers saw their sales fall by 0.9% in August. Sales at these dealers have increased at a rapid clip since the fall of 2005, peaking in April 2006. Most of this increase was attributable to the increased demand for recreational motor vehicles.

Retail sales gains in the building and outdoor home supplies stores sector were mainly due to home centre and hardware store sales, which were up by 1.7% in August. These types of stores continue to see a remarkable run-up in sales, experiencing only one month of decline in the previous 12-month period.

Within the furniture, home furnishings and electronics stores sector, sales at furniture stores advanced by 2.0%, contributing to over half of the sales gains in this sector. August's sales growth was the strongest since January 2006 when gift cards were thought to have induced a 6.9% spike in sales at furniture stores. Sales also rose in the other components of this sector: computer and software stores (+1.5%), home furnishings stores (+1.0%) and home electronics and appliance stores (+0.8%).

Both the general merchandise stores and clothing and accessories stores sectors saw sales advance 1.0%

in August. Despite increases in sales at clothing stores (+0.7%) and shoe, clothing accessories and jewellery stores (+2.0%) in August, sales in both types of stores have levelled off in the recent months after a period of strong gains.

Sales in the food and beverage stores sector have picked up slightly since February 2006 after a relatively flat 2005. Supermarkets, which hold about 70% of the market share within this sector, saw sales increase by 0.4% in August. After a large drop in sales in January 2006, supermarkets were still trying to catch up to the December 2005 peak. The smaller components of this sector also experienced sales increases in August: convenience and speciality food stores (+1.4%); and, beer, wine and liquor stores (+1.0%).

Pharmacies and personal care stores posted their 10th consecutive sales increase in August. According to the Quarterly Retail Commodity Survey, health and personal care products, which account for 86% of sales in the sector, showed the second strongest sales growth among the major commodity groupings in the second quarter of 2006 over the same period in 2005. Only automotive fuels, oils and additives had a larger growth rate, with higher gasoline prices playing a major role.

Sales increase in most provinces

Overall, eight provinces and one territory saw sales increase in August. Leading the pack were the Northwest Territories (+5.0%) and Alberta (+1.8%). For Alberta, this marked its 11th consecutive sales increase and the highest year-over-year increase (+18.1%) for any province since the series began. Retail sales in Alberta have been rising sharply since 2000, as the province benefits from a boom in oil and gas production.

Retailers in Ontario posted their fifth monthly increase in 2006 in August (+1.1%). Sales in British Columbia advanced by 1.0% in August and have been

generally rising after a period of flatness in 2002. Retail sales in Quebec rose 0.8%, mainly due to the automotive sector. According to the New Motor Vehicle Sales Survey, Quebec was responsible for over half of the national increase in motor vehicles sold in August.

Saskatchewan (-0.6%) and New Brunswick (-0.1%) were the only two provinces that posted lower sales.

Related indicators for September

Employment edged up slightly in September (+16,000), following three months of little change. The unemployment rate fell 0.1 percentage points to 6.4% in September, while the share of the population which was employed remained near record highs.

Housing starts were down 2.4% in August to a seasonally adjusted annual rate of 211,300 units, according to the Canada Mortgage and Housing Corporation. The decline in housing starts is attributable to a decline in multiple starts, which reached their lowest level since July 2004. For a second consecutive month, single-detached starts edged higher.

Available on CANSIM: tables 080-0014 to 080-0017.

Definitions, data sources and methods: survey numbers, including related surveys, 2406 and 2408.

The August 2006 issue of *Retail Trade* (63-005-XIE, free) will soon be available.

Data on retail trade for September will be released on November 21.

For more information or to order data, contact Client Services (toll-free 1-877-421-3067; 613-951-3549; retailinfo@statcan.ca). For analytical information, or to enquire about the concepts, methods or data quality of this release, contact Lucy Chung (613-951-1903), Distributive Trades Division.

□

Retail sales

	August 2005	May 2006 ^r	June 2006 ^r	July 2006 ^r	August 2006 ^p	July to August 2006	August 2005 to August 2006
Seasonally adjusted							
	\$ millions				% change		
Automotive	10,887	11,286	11,165	11,632	11,808	1.5	8.5
New car dealers	6,245	6,074	5,957	6,267	6,521	4.1	4.4
Used and recreational motor vehicle and parts dealers	1,281	1,522	1,508	1,545	1,531	-0.9	19.5
Gasoline stations	3,361	3,690	3,700	3,819	3,756	-1.7	11.8
Furniture, home furnishings and electronics stores	2,152	2,305	2,313	2,321	2,351	1.3	9.2
Furniture stores	748	795	789	791	807	2.0	7.9
Home furnishings stores	408	448	450	445	450	1.0	10.1
Computer and software stores	133	130	135	137	139	1.5	4.1
Home electronics and appliance stores	863	932	938	948	956	0.8	10.8
Building and outdoor home supplies stores	1,927	2,077	2,090	2,101	2,131	1.4	10.6
Home centres and hardware stores	1,539	1,687	1,713	1,716	1,746	1.7	13.5
Specialized building materials and garden stores	388	390	376	385	386	0.2	-0.7
Food and beverage stores	7,211	7,325	7,324	7,344	7,387	0.6	2.4
Supermarkets	5,254	5,252	5,244	5,283	5,301	0.4	0.9
Convenience and specialty food stores	757	797	798	799	810	1.4	6.9
Beer, wine and liquor stores	1,200	1,276	1,282	1,263	1,276	1.0	6.3
Pharmacies and personal care stores	2,012	2,211	2,238	2,251	2,266	0.6	12.6
Clothing and accessories stores	1,734	1,874	1,871	1,843	1,862	1.0	7.3
Clothing stores	1,325	1,442	1,428	1,407	1,417	0.7	7.0
Shoe, clothing accessories and jewellery stores	409	432	443	436	444	2.0	8.6
General merchandise stores	3,618	3,912	3,853	3,870	3,908	1.0	8.0
Miscellaneous retailers	1,539	1,678	1,682	1,674	1,664	-0.6	8.2
Sporting goods, hobby, music and book stores	788	835	838	841	845	0.5	7.2
Miscellaneous store retailers	750	843	844	833	819	-1.7	9.1
Total retail sales	31,080	32,669	32,535	33,037	33,377	1.0	7.4
Total excluding new car dealers, used and recreational motor vehicle and parts dealers	23,553	25,072	25,070	25,225	25,324	0.4	7.5
Provinces and territories							
Newfoundland and Labrador	488	501	497	502	503	0.3	3.0
Prince Edward Island	119	124	120	122	123	1.3	3.3
Nova Scotia	897	954	912	946	954	0.8	6.4
New Brunswick	703	745	727	748	747	-0.1	6.2
Quebec	6,950	7,267	7,261	7,366	7,426	0.8	6.9
Ontario	11,365	11,666	11,661	11,831	11,964	1.1	5.3
Manitoba	1,064	1,107	1,093	1,111	1,116	0.5	4.9
Saskatchewan	942	984	974	989	983	-0.6	4.3
Alberta	4,159	4,733	4,750	4,824	4,912	1.8	18.1
British Columbia	4,286	4,477	4,430	4,489	4,536	1.0	5.8
Yukon	37	38	38	38	38	-0.9	2.6
Northwest Territories	48	51	51	50	52	5.0	8.6
Nunavut	21	21	21	22	22	-1.3	2.3

^r revised

^p preliminary

Retail sales

	August 2005	July 2006 ^r	August 2006 ^p	August 2005 to August 2006
Unadjusted				
	\$ millions			% change
Automotive	11,767	12,677	13,075	11.1
New car dealers	6,661	6,773	7,192	8.0
Used and recreational motor vehicle and parts dealers	1,396	1,756	1,681	20.4
Gasoline stations	3,710	4,148	4,202	13.3
Furniture, home furnishings and electronics stores	2,176	2,248	2,384	9.6
Furniture stores	785	840	854	8.8
Home furnishings stores	412	426	456	10.8
Computer and software stores	128	120	135	4.9
Home electronics and appliance stores	851	862	939	10.4
Building and outdoor home supplies stores	2,152	2,410	2,391	11.1
Home centres and hardware stores	1,711	1,972	1,940	13.4
Specialized building materials and garden stores	442	438	451	2.1
Food and beverage stores	7,251	7,775	7,639	5.3
Supermarkets	5,142	5,422	5,373	4.5
Convenience and specialty food stores	810	886	879	8.5
Beer, wine and liquor stores	1,299	1,467	1,387	6.8
Pharmacies and personal care stores	1,984	2,168	2,252	13.5
Clothing and accessories stores	1,727	1,724	1,852	7.2
Clothing stores	1,308	1,318	1,399	6.9
Shoe, clothing accessories and jewellery stores	419	407	453	8.1
General merchandise stores	3,544	3,930	3,857	8.9
Miscellaneous retailers	1,608	1,631	1,728	7.4
Sporting goods, hobby, music and book stores	796	798	868	8.9
Miscellaneous store retailers	812	833	860	6.0
Total retail sales	32,209	34,562	35,178	9.2
Total excluding new car dealers, used and recreational motor vehicle and parts dealers	24,151	26,034	26,305	8.9
Provinces and territories				
Newfoundland and Labrador	534	538	557	4.4
Prince Edward Island	139	142	144	3.8
Nova Scotia	937	1,007	1,012	8.1
New Brunswick	752	796	806	7.2
Quebec	7,207	7,790	7,858	9.0
Ontario	11,700	12,210	12,466	6.6
Manitoba	1,102	1,159	1,187	7.7
Saskatchewan	997	1,050	1,055	5.8
Alberta	4,319	5,035	5,191	20.2
British Columbia	4,408	4,714	4,779	8.4
Yukon	42	45	44	3.3
Northwest Territories	50	54	56	10.9
Nunavut	22	22	23	2.7

^r revised

^p preliminary

Deliveries of major grains

September 2006

Data on September grain deliveries are now available.

Available on CANSIM: table 001-0001.

Definitions, data sources and methods: survey numbers, including related surveys, 3403, 3404 and 3443.

The September 2006 issue of *Cereals and Oilseeds Review* (22-007-XIB, free) will be available in November.

For general information, or to enquire about the concepts, methods or data quality of this release, contact Client Services (toll-free 1-800-465-1991; agriculture@statcan.ca), Agriculture Division. ■

Crushing statistics

September 2006

Oilseed processors crushed 269 076 metric tonnes of canola in September. Oil production totalled 114 213 tonnes while meal production amounted to 160 238 tonnes.

Available on CANSIM: table 001-0005.

Definitions, data sources and methods: survey number 3404.

The September 2006 issue of *Cereals and Oilseeds Review* (22-007-XIB, free) will be available in November.

For general information, or to enquire about the concepts, methods or data quality of this release, contact Client Services (toll-free 1-800-465-1991; agriculture@statcan.ca), Agriculture Division. ■

Cereals and oilseeds review

August 2006

The August 2006 issue of *Cereals and Oilseeds Review*, Vol. 29, no. 8 (22-007-XIB, free) is now available from the *Publications* module of our website.

An overview of current grain supplies and markets is also included in this publication.

Definitions, data sources and methods: survey numbers, including related surveys, 3401 and 3464.

For further information, or to enquire about the concepts, methods or data quality of this release, contact Client Services (toll-free 1-800-465-1991; agriculture@statcan.ca), Agriculture Division. ■

Crude oil and natural gas production

August 2006 (preliminary)

Provincial crude oil and marketable natural gas production data are now available for August.

Definitions, data sources and methods: survey number 2198.

For more information, or to enquire about the concepts, methods or data quality of this release, contact the Marketing and Dissemination Section (613-951-9497; toll-free 1-866-873-8789; energ@statcan.ca), Manufacturing, Construction and Energy Division. ■

Production and disposition of tobacco products

September 2006

Total cigarettes sold in September by Canadian manufacturers decreased 18.1% from August to 1.7 billion cigarettes, down 47.7% compared with September 2005.

Cigarette production in September decreased 1.8% from August to 1.9 billion cigarettes, down 42.4% from September 2005.

At 1.6 billion cigarettes, the level of closing inventories for September increased 15.3% from August, down 65.7% from September 2005.

Available on CANSIM: table 303-0062.

Definitions, data sources and methods: survey number 2142.

The September 2006 issue of *Production and Disposition of Tobacco Products*, Vol. 35, no. 9 (32-022-XIE, free) is now available from the *Publications* module of our website.

For general information, or to enquire about the concepts, methods or data quality of this release, contact the dissemination officer (613-951-9497; toll-free 1-866-873-8789; manufact@statcan.ca), Manufacturing, Construction and Energy Division. ■

New products

Cereals and Oilseeds Review, August 2006, Vol. 29,
no. 8
Catalogue number 22-007-XIB
(free).

Production and Disposition of Tobacco Products,
September 2006, Vol. 35, no. 9
Catalogue number 32-022-XIE
(free).

All prices are in Canadian dollars and exclude sales tax. Additional shipping charges apply for delivery outside Canada.

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How to order products

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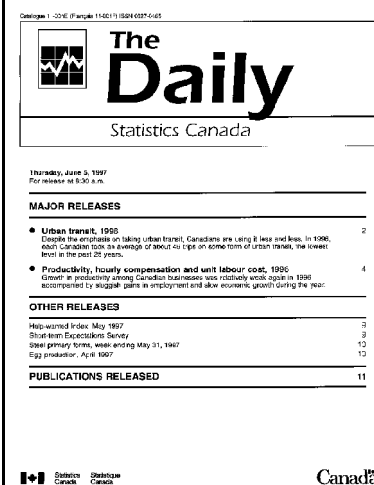
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MAJOR RELEASES

- **Urban transit, 1995** 2
Despite the emphasis on taking urban transit, Canadians are using 8 less automobiles, in 1996, each Canadian took the average of about 191 on some form of urban transit, the lowest level in the past 25 years.
- **Productivity, hourly compensation and unit labour cost, 1995** 4
Growth in productivity among Canadian businesses was relatively weak again in 1996 accompanied by sluggish gains in employment and slow economic growth (GDP) in 1996.

OTHER RELEASES

- **Help-wanted index, May 1997** 3
- **Short-term Expectations Survey** 3
- **Steel primary forms, week ending May 31, 1997** 12
- **Egg production, Apr. 1997** 12

PUBLICATIONS RELEASED 11

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