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## Releases

## Monthly Survey of Manufacturing <br> \section*{May 2006}

A big boost in the production of aerospace products overshadowed an otherwise weak May for manufacturers.

Aerospace manufacturing boosts total shipments


Shipments advanced $0.3 \%$ to $\$ 50.9$ billion in May, on the heels of widespread gains in the aerospace industry. The production of aerospace products and parts soared $79.8 \%$ to $\$ 1.6$ billion in May, following a 36.6\% drop in April.

## Aerospace manufacturers work through orders

Global demand for domestic and military-related aircraft and parts has been fuelling the strength in aerospace manufacturing since early 2005. Loaded with orders, aerospace production has been quite volatile in recent months, and has contributed to investment in plants and the hiring of additional staff in the once beleaguered industry.

## Manufacturing activity lacklustre in May

A different picture emerges when the aerospace products and parts industry is excluded from total

## Note to readers

Non-durable goods industries include food, beverage and tobacco products, textile mills, textile product mills, clothing, leather and allied products, paper, printing and related support activities, petroleum and coal products, chemicals, and plastics and rubber products.

Durable goods industries include wood products, non-metallic mineral products, primary metals, fabricated metal products, machinery, computer and electronic products, electrical equipment, appliances and components, transportation equipment, furniture and related products and miscellaneous manufacturing.

Unfilled orders are a stock of orders that will contribute to future shipments assuming that the orders are not cancelled.

New orders are those received whether shipped in the current month or not. They are measured as the sum of shipments for the current month plus the change in unfilled orders. Some people interpret new orders as orders that will lead to future demand. This is inappropriate since the "new orders" variable includes orders that have already been shipped. Readers should note that the month-to-month change in new orders may be volatile. This will happen particularly if the previous month's change in unfilled orders is closely related to the current month's change.

Not all orders will be translated into Canadian factory shipments because portions of large contracts can be subcontracted out to manufacturers in other countries. Also, some orders may be cancelled.
manufacturing in May. Shipments dropped 1.1\% excluding aerospace, pulled down by the petroleum and motor vehicle industries.

The trend for shipments, although negative, has been relatively stable in recent months. In May, only 10 of the 21 manufacturing industries, accounting for $61 \%$ of total shipments, posted increases.

In 1997 dollars, shipments rose $0.8 \%$ to $\$ 47.3$ billion in May, making up some ground following April's 1.5\% drop. The volume of goods shipped by manufacturers has only increased in three of the last seven months.

## Soaring prices boost primary metals

In addition to aerospace manufacturing, the primary metals industry posted a $4.1 \%$ gain in shipments to $\$ 4.6$ billion in May, due to escalating industrial prices.

Manufacturers of primary metal products have benefited from sky-high demand for copper, nickel, zinc and aluminium. The global demand and consequently, low inventories for some products have contributed to record prices. In May, the price of primary metals
jumped $6.8 \%$ and have risen $21 \%$ since the close of 2005 .

The petroleum and motor vehicles industries counterbalanced some of the gains in May.

Refinery shutdowns for maintenance contributed to a substantial $6.7 \%$ drop in shipments of petroleum and coal products to $\$ 4.6$ billion in May, the second decrease so far in 2006. The decline in shipments occurred despite a $1.0 \%$ rise in petroleum prices as the price of crude oil soared above US $\$ 75$ per barrel in early May.

Motor vehicle manufacturers gave back all of April's gains ( $+2.7 \%$ ) as shipments fell by $5.2 \%$ to $\$ 5.0$ billion in May, marking the third decrease in five months.

January-to-May shipments of motor vehicles were $9.4 \%$ below levels for the same period one year ago, a reflection of waning demand in North America for various models of motor vehicles as consumers react to higher gasoline prices and rising interest rates.

## Most provinces on the plus side

The majority of provinces and the territories reported higher shipments in May. Quebec led the eight provinces posting increases as shipments advanced by $\$ 395$ million ( $+3.2 \%$ ) to $\$ 12.6$ billion. The aerospace industry largely contributed to the boon in Quebec. Excluding the industry, Quebec shipments fell by 2.1\%.

Resource-based manufacturers in New Brunswick propped up the province's shipments by $\$ 115$ million ( $+9.4 \%$ ) to $\$ 1.3$ billion.

Manufacturing shipments, by province and territory

|  | $\begin{aligned} & \text { April } \\ & 2006^{r} \end{aligned}$ | $\begin{gathered} \text { May } \\ 2006^{p} \end{gathered}$ | $\begin{array}{r} \text { April } \\ \text { to } \\ \text { May } \\ 2006 \\ \hline \end{array}$ |
| :---: | :---: | :---: | :---: |
|  | Seasonally adjusted |  |  |
|  | \$ millions |  | \% change |
| Canada | 50,761 | 50,938 | 0.3 |
| Newfoundland and |  |  |  |
| Labrador | 214 | 215 | 0.5 |
| Prince Edward Island | 117 | 118 | 1.2 |
| Nova Scotia | 814 | 829 | 1.8 |
| New Brunswick | 1,221 | 1,336 | 9.4 |
| Quebec | 12,229 | 12,624 | 3.2 |
| Ontario | 25,233 | 24,830 | -1.6 |
| Manitoba | 1,085 | 1,053 | -3.0 |
| Saskatchewan | 964 | 998 | 3.5 |
| Alberta | 5,138 | 5,154 | 0.3 |
| British Columbia | 3,734 | 3,769 | 0.9 |
| Yukon | 1 | 1 | -2.4 |
| Northwest Territories |  |  |  |
| including Nunavut | 9 | 11 | 16.9 |

Ontario was the primary offsetting province, pulled down by the weakened motor vehicle industry,
coupled with decreases in machinery and chemical products. Manufacturing shipments in Ontario dropped by $\$ 403$ million ( $-1.6 \%$ ) to $\$ 24.8$ billion in May. Year-to-date shipments in Ontario were down 3.3\% compared to the first five months of 2005.

## Inventories expand in May

Manufacturers' total inventories bounced back by $1.6 \%$ to $\$ 66.9$ billion in May following a $0.6 \%$ drop in April. May's increase in the inventory level was the largest in a year and a half. Strength in the aerospace industry ( $+16.0 \%$ ) was the main contributor. Excluding aerospace, inventories rose a more moderate $0.6 \%$.

The increase in inventories was concentrated in the goods-in-process (+5.1\%) stage of fabrication, although all three stages of fabrication increased in May.

Strong inventory increases, due to aerospace


## Inventory-to-shipment ratio on upward trend

The inventory-to-shipment ratio edged up to 1.31 from 1.30 in April, equalling its recent high of last February. The trend for the ratio, which had remained relatively stable last year, has been on the rise in 2006 as shipment activity strains under several factors including the strong-valued Canadian dollar and soaring input costs.

The inventory-to-shipment ratio is a key measure of the time, in months, that would be required to exhaust inventories if shipments were to remain at their current level.


## New aerospace orders lead all industries

Strong demand for Canadian-made aircraft and parts was largely responsible for the $0.7 \%$ increase in new orders to $\$ 50.6$ billion. New orders in the aerospace industry doubled in May, making up for most of the ground lost in April. Excluding aerospace products and parts, new orders were down $0.7 \%$.

Other industries with sizeable increases included fabricated metal products, machinery and primary metals. Overall, new orders have trended downward over the last eight months, the longest downward slide in more than two years.

## Unfilled orders decline, but levels remain healthy compared to 2005

For the second month in a row, unfilled orders weakened. The backlog of orders fell $0.7 \%$ to $\$ 42.4$ billion, slowing somewhat from April's drop of $1.1 \%$. The trend for unfilled orders has also slowed in recent months, following about 18 months of growth.

May's decrease in orders was wide ranging, including aerospace ( $-1.6 \%$ ), railroad rolling stock (-4.0\%) and primary metals (-3.6\%).

Despite recent slowdowns, the average annual level of unfilled orders remains almost $10 \%$ higher in 2006 when compared to one year ago.


## Manufacturing employment continues to recede

According to the most recent release of the Labour Force Survey, employment in manufacturing was little changed in June ( $-4,100$ ), following almost 22,000 job losses in May. There were 83,000 ( $-3.8 \%$ ) fewer employees on factory payrolls in May 2006 compared to one year ago.

Available on CANSIM: tables 304-0014, 304-0015 and 377-0008.

Definitions, data sources and methods: survey number 2101.

All data are benchmarked to the 2001 Annual Survey of Manufactures.

Data from the June Monthly Survey of Manufacturing will be released on August 16.

The 2005 annual review of manufacturing shipments was released on June 28.

For general information or to order data, contact the dissemination officer (toll-free 1-866-873-8789; 613-951-9497; fax: 613-951-9499; manufact@statcan.ca). To enquire about the concepts, methods or data quality of the release, contact Russell Kowaluk (613-951-0600; kowarus@statcan.ca), Manufacturing, Construction and Energy Division.

Shipments, inventories and orders in all manufacturing industries


Manufacturing industries except motor vehicle, parts and accessories

|  | Shipments |  | Inventories |  | Unfilled orders |  | New orders |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | Seasonally adjusted |  |  |  |  |  |  |  |
|  | \$ millions | \% change | \$ millions | \% change | \$ millions | \% change | \$ millions | \% change |
| May 2005 | 42,241 | 0.0 | 61,066 | 0.5 | 38,027 | 1.7 | 42,862 | 1.1 |
| June 2005 | 42,531 | 0.7 | 61,172 | 0.2 | 38,484 | 1.2 | 42,988 | 0.3 |
| July 2005 | 42,226 | -0.7 | 61,844 | 1.1 | 39,092 | 1.6 | 42,834 | -0.4 |
| August 2005 | 42,805 | 1.4 | 61,968 | 0.2 | 39,881 | 2.0 | 43,593 | 1.8 |
| September 2005 | 42,981 | 0.4 | 61,503 | -0.7 | 39,755 | -0.3 | 42,855 | -1.7 |
| October 2005 | 43,201 | 0.5 | 61,843 | 0.6 | 40,315 | 1.4 | 43,761 | 2.1 |
| November 2005 | 42,863 | -0.8 | 62,317 | 0.8 | 40,412 | 0.2 | 42,960 | -1.8 |
| December 2005 | 43,489 | 1.5 | 62,191 | -0.2 | 40,434 | 0.1 | 43,511 | 1.3 |
| January 2006 | 43,698 | 0.5 | 62,235 | 0.1 | 40,677 | 0.6 | 43,941 | 1.0 |
| February 2006 | 42,412 | -2.9 | 62,503 | 0.5 | 40,799 | 0.4 | 42,574 | -3.0 |
| March 2006 | 43,544 | 2.7 | 62,734 | 0.4 | 40,643 | -0.4 | 43,388 | 1.9 |
| April 2006 | 43,034 | -1.2 | 62,391 | -0.5 | 40,186 | -1.1 | 42,577 | -1.9 |
| May 2006 | 43,458 | 1.0 | 63,447 | 1.7 | 39,892 | -0.7 | 43,165 | 1.4 |

## Movie theatres and drive-ins <br> 2004/2005

Movie attendance rebounded slightly in 2004/2005 as more Canadians went to both movie theatres and drive-ins, and the industry enjoyed growth in total revenues, profits and profit margin.

Movie theatres and drive-ins combined sold 120.3 million tickets, up a slight $0.5 \%$ from the previous year, according to new data from the Motion Picture Theatres Survey.

The recovery helped take the sting out of a $4.6 \%$ decline in attendance in 2003/2004. But attendance in 2004/2005 was still $4.1 \%$ lower than it was in 2002/2003, which was the highest since 1960.

Despite this small gain in attendance, the film exhibition industry reported a huge 97.6\% increase in operating profit which totalled $\$ 108.2$ million in 2004/2005. The industry's profit margin also increased from $4.5 \%$ to $8.7 \%$.

## Surge in attendance at drive-ins

Movie theatres, excluding drive-ins, recorded 118.5 million visits, a marginal $0.3 \%$ increase.

On the other hand, attendance at drive-ins surged $20.4 \%$ to 1.8 million, halting eight consecutive years of decline. The growth in attendance at drive-in theatres was accompanied by a $6.9 \%$ drop in the average admission price, which fell to $\$ 7.02$.

Attendance at movie theatres grew despite a 0.3\% increase in admission prices, which averaged \$7.47.

Attendance at older movie theatres and drive-ins, those in operation since at least 2003/2004, increased 0.9\%. Their average attendance was 193,965. Some 44 new theatres were opened, and they reported an average attendance of 101,777.

The industry reported a drop in employment. The number of full-time staff fell $6.3 \%$ to 1,836 , whereas part-time employment was down $3.6 \%$ to 14,975 .

## Albertans continue to be the most avid movie-goers

Residents of Alberta continued to be Canada's most avid movie-goers. On average, each Albertan went to the movies 4.7 times. Although the average number of visits was slightly up from the previous year, it was still below the 2002/2003 level of 5.1.

Per capita attendance in Alberta, Prince Edward Island, Manitoba, British Columbia and Quebec exceeded the national average of 3.8 visits per year in 2004/2005, as it had in the previous year.

According to data from the Survey of Household Spending, households in Alberta spent an average

## Note to readers

The Motion Picture Theatres Survey collects data on all movie theatres and drive-in theatres in Canada. The 2004/2005 survey included 583 movie theatres and 58 drive-ins that provided data for their business years ending between April 1, 2004 and March 31, 2005.

Theatres with total operating revenues of less than \$500,000 are referred to as small theatres. Medium-sized theatres earned $\$ 500,000$ to $\$ 999,999$, while large theatres reported revenues of $\$ 1$ million to $\$ 5$ million. Very large theatres are those with revenues over $\$ 5$ million. The large and very large theatres are frequently grouped together in this release and are referred to as larger theatres.

The term older theatres refers to establishments that were in operation in both 2003/2004 and 2004/2005. Newly opened theatres mentioned in this release are those that opened in 2004/2005.

No survey was conducted for the survey year 2001/2002.
of $\$ 125$ on these visits in 2004, up from $\$ 117$ in 2003. In Canada, the corresponding spending increased from \$106 in 2003 to $\$ 112$ in 2004.

This keen interest in movies in Alberta may be the result of high per capita income, a younger age structure and a proportionately larger number of chain-operated theatres than in most other provinces and territories.

After reporting the lowest per capita attendance for years, Newfoundland and Labrador had the second lowest for the first time. It was replaced by New Brunswick, which had a per capita attendance of 2.3 visits.

Most provinces and territories reported increases in attendance, although Prince Edward Island, Nova Scotia, New Brunswick and the combined territories reported declines. The increases ranged from $0.3 \%$ in Ontario to $4.0 \%$ in Saskatchewan.

## Attendance increases only at larger movie theatres

The gain in movie attendance in 2004/2005, excluding drive-ins, was due entirely to larger, older movie theatres, which reported 102.9 million visits, a $1.6 \%$ increase.

Medium-sized older theatres recorded an 8.1\% decline in attendance, while small older movie theatres recorded 5.4 million visits, down $4.2 \%$.

In addition, 39 movie theatres were opened in 2004, 10 of which were larger theatres. They reported a total attendance of 3.3 million.

Theatres operated as part of a chain attract a considerably larger number of patrons than independently operated theatres. On a per-theatre basis, chain-operated theatres had an average annual attendance of 346,200 , which was more than four times
the average attendance of independently operated theatres $(77,370)$.

The overall growth in attendance over the last decade has increased the market share of attendance at larger theatres at the expense of smaller theatres.

In 1991/1992, small theatres accounted for more than one-half (54\%) of all theatres and $16 \%$ of attendance. By 2004/2005, their share was down to $44 \%$ of all theatres and only $5 \%$ of attendance.

In contrast, over the same period, the share of larger theatres increased from $27 \%$ to $44 \%$ of all theatres, while their share of attendance rose from $67 \%$ to $90 \%$. Similarly, the market share of screens for these larger movie theatres increased from 53\% in 1991/1992 to 79\% in 2004/2005.

## Movie theatres: Increase in profits and profit margin

Movie theatres, excluding drive-ins, earned $\$ 1.2$ billion in operating revenues in 2004/2005, up $1.7 \%$ from the previous year. Admission receipts accounted for $68 \%$ of this total, while most of the remaining revenues came from refreshment sales.

Movie theatres earned a total profit of $\$ 106.4$ million, up $101.9 \%$. Their profit margin also increased from $4.4 \%$ to $8.7 \%$.

However, only larger theatres were profitable, earning an average profit of $\$ 421,078$, up $93.3 \%$. Medium-sized theatres incurred an average loss of $\$ 5,398$, and small theatres, an average loss of $\$ 541$.

Larger older theatres accounted for $97 \%$ of the total profits of movie theatres and were largely responsible for the increase in profits from the preceding year.

These movie theatres reported growth in their revenues from admissions and refreshment bar sales. But they were able to realize larger profits because they held their operating expenses fairly constant from the previous year.

In addition, 10 new larger theatres contributed $\$ 4.1$ million to the overall profits of the cinema industry.

Chain-operated movie theatres earned about 17 times the average profit of the
independently-operated theatres. This is because most of the chain theatres are multi-screen theatres located in urban centres.

In 2004/2005, the average profit for each chain theatre was about $\$ 365,450$, compared with $\$ 21,470$ for each independent theatre.

## Drive-ins: Increase in attendance, but profits fall

Total attendance at drive-in theatres, about 1.8 million, accounted for only $1.5 \%$ of all theatre attendance in 2004/2005. After eight consecutive years of decline, attendance at drive-ins grew an impressive 20.4\%. Five drive-ins were opened and only one closed during the year.

Despite the increase in attendance, operating profits of drive-ins fell $14.2 \%$ to $\$ 1.7$ million. Their profit margin also fell from $11.5 \%$ to $9.2 \%$.

Newly opened drive-ins contributed significantly to the drop in profits.

As well, a growth in salary budget of $14 \%$ to $\$ 4.1$ million and the $6.9 \%$ decrease in average admission price contributed to the drop in profits.

## Available on CANSIM: table 501-0010.

Definitions, data sources and methods: survey number 2416.

Selected details from the Motion Picture Theatres Survey are now available in the publication Movie Theatres and Drive-ins: Data Tables, 2004/2005 (87F0009XIE, free) from the Our Products and Services page of our website. Data from this survey are also available by province and territory. Researchers can request special tabulations on a cost-recovery basis.

To obtain more information, order data or enquire about the methods, concepts or data quality of this release, contact Client Services (toll-free 1-800-307-3382; fax: 613-951-9040; culture@statcan.ca), Culture, Tourism and the Centre for Education Statistics.

## Movie and drive-in theatres

|  | Movie theatres |  |  | Drive-ins |  |  | Total |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | 1999/2000 | 2003/2004 | 2004/2005 | 1999/2000 | 2003/2004 | 2004/2005 | 1999/2000 | 2003/2004 | 2004/2005 |
| Number of theatres | 644 | 574 | 583 | 68 | 54 | 58 | 712 | 628 | 641 |
| Number of screens | 2,820 | 2,896 | 2,842 | 106 | 84 | 91 | 2,926 | 2,980 | 2,933 |
| Full-time employees | 1,787 | 1,871 | 1,747 | 104 | 89 | 89 | 1,891 | 1,960 | 1,836 |
| Part-time employees | 13,591 | 14,961 | 14,387 | 713 | 558 | 588 | 14,304 | 15,519 | 14,975 |
|  |  |  |  |  | thousands |  |  |  |  |
| Attendance | 117,352 | 118,161 | 118,498 | 1,940 | 1,477 | 1,778 | 119,291 | 119,637 | 120,275 |
| Box office receipts (dollars) | 643,448 | 835,152 | 833,327 | 11,425 | 10,379 | 11,417 | 654,873 | 845,531 | 844,744 |
| Total revenues (dollars) | 927,027 | 1,206,328 | 1,226,249 | 19,636 | 17,584 | 18,945 | 946,663 | 1,223,912 | 1,245,194 |
| Profit (dollars) | 39,223 | 52,701 | 106,421 | 2,446 | 2,027 | 1,739 | 41,669 | 54,728 | 108,161 |

Note: Detail may not always add to total due to rounding.

## Annual per-capita attendance at movie theatres and drive-ins

|  | Number of visits |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | 1999/2000 | 2000/2001 | 2002/2003 | 2003/2004 | 2004/2005 |
| Canada | 3.9 | 3.9 | 4.0 | 3.8 | 3.8 |
| Newfoundland and Labrador | 1.5 | 1.4 | 2.5 | 2.4 | 2.5 |
| Prince Edward Island | 2.8 | 3.1 | 4.1 | 4.3 | 4.1 |
| Nova Scotia | 3.3 | 3.5 | 3.8 | 3.8 | 3.6 |
| New Brunswick | 2.7 | 3.1 | 2.8 | 2.6 | 2.3 |
| Quebec | 3.9 | 3.8 | 4.0 | 3.9 | 3.9 |
| Ontario | 3.8 | 3.8 | 3.8 | 3.6 | 3.5 |
| Manitoba | 3.8 | 3.6 | 4.2 | 4.0 | 4.0 |
| Saskatchewan | 3.8 | 3.5 | 3.6 | 3.4 | 3.5 |
| Alberta | 5.1 | 5.0 | 5.1 | 4.6 | 4.7 |
| British Columbia | 4.1 | 4.2 | 4.1 | 3.9 | 3.9 |
| Yukon, Northwest Territories and Nunavut | 2.9 | 3.0 | 3.7 | 3.2 | 3.0 |

Market share of attendance, by size of movie theatre

|  | 1991/1992 | 1999/2000 | 2002/2003 | 2003/2004 | 2004/2005 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Total number of movie theatres | 620 | 644 | 587 | 574 | 583 |
| Total movie attendance (millions) | 69.2 | 117.4 | 123.8 | 118.2 | 118.5 |
|  | \% |  |  |  |  |
| Small theatres |  |  |  |  |  |
| Number of theatres | 54 | 42 | 44 | 43 | 44 |
| Attendance | 16 | 6 | 5 | 5 | 5 |
| Medium theatres |  |  |  |  |  |
| Number of theatres | 19 | 17 | 13 | 13 | 12 |
| Attendance | 17 | 10 | 6 | 6 | 5 |
| Larger theatres |  |  |  |  |  |
| Number of theatres | 27 | 41 | 43 | 44 | 44 |
| Attendance | 67 | 84 | 89 | 89 | 90 |
| All theatres |  |  |  |  |  |
| Number of theatres | 100 | 100 | 100 | 100 | 100 |
| Attendance | 100 | 100 | 100 | 100 | 100 |

## Quarterly Retail Commodity Survey

First quarter 2006
Since the beginning of 2005 and continuing into the first quarter of 2006, rising fuel prices at the pump have caused consumers to spend proportionately more of their retail dollar on automotive fuels, oils and additives.

Consumers spent $\$ 8.3$ billion on automotive fuels, oils and additives in retail stores in the first quarter of 2006, up $14.2 \%$ over the same quarter last year. This was due in part to an $11.2 \%$ increase in the price of gasoline over the same period.

Automotive fuels, oils and additives accounted for 10 cents of every retail dollar in the first quarter of 2006, the fifth consecutive quarter that automotive fuels, oils and additives represented at least 9 cents of every dollar spent in retail stores. In comparison, in 2003, this commodity represented 8 cents of every retail dollar.

Consumers spent $\$ 82.7$ billion on goods and services in retail stores in the first quarter of 2006, up $6.5 \%$ over the first quarter of 2005 . The commodities which contributed the most to the increase were automotive fuels, oils and additives and motor vehicles, parts and services.

Sales of motor vehicles, parts and services amounted to $\$ 18.1$ billion in the first quarter, up $4.8 \%$ over the same quarter last year. New vehicle sales grew by $5.4 \%$, sales of used vehicles were up $2.0 \%$ while sales of automotive parts and services (including tires) rose $7.6 \%$ over last year.

The strength of the housing market continued to boost sales of furniture, home furnishings and electronics, as well as hardware, lawn and garden products.

Consumers spent $\$ 7.7$ billion on furniture, home furnishings and electronics in retail stores, climbing 10.6\% over the first quarter of 2005, and the largest increase since the second quarter of 2002. This advance was due to rising demand for home furnishings (+13.8 \%) such as floor coverings, draperies, bedding and artwork and for indoor furniture (+13.5\%). Sales of household appliances were also strong, up $9.7 \%$, and sales of home electronics, such as televisions, cameras, computer hardware and software and telephones, increased 6.9\%.

Compared to the same quarter last year, sales of hardware, lawn and garden products rose $13.2 \%$ to $\$ 4.6$ billion. This advance was due to a $14.2 \%$ jump in sales of hardware and home renovation products, the largest gain since the third quarter of 2003. Within this category, sales of lumber and other building materials were particularly strong, up $22.5 \%$.

Sales of clothing, footwear and accessories rose $7.1 \%$ from the first quarter of 2005, the biggest increase since the beginning of the series in 1999. This growth was due largely to a surge in sales of women's clothing (+7.6\%). Men's clothing sales were also up (+4.8\%) but those of children's clothing declined slightly. All categories of clothing experienced a decline in prices in the first quarter of 2006 compared to the first quarter of 2005.

While sales of many commodities registered their best performance in some time, sales of food and beverages registered their lowest year-over-year growth (+2.6\%) since the second quarter of 2002. Food and beverages represented 23 cents of every retail dollar in the first quarter of 2006. The market share for food and beverage stores declined one percentage point from the same quarter of 2005, while general merchandisers (which include department stores) gained one percentage point.

Note: The Quarterly Retail Commodity Survey collects national level retail sales by commodity, from a sub-sample of businesses in the Monthly Retail Trade Survey. Quarterly data have not been adjusted for seasonality. For example, no adjustment has been made for Easter, which occurred in the second quarter in 2006 but took place in the first quarter in 2005. All percentage changes are year-over-year.

## Available on CANSIM: table 080-0018.

## Definitions, data sources and methods: survey number 2008.

For general information or to order data, contact Client Services (toll-free 1-877-421-3067; 613-951-3549; retailinfo @statcan.ca). To enquire about the concepts, methods or data quality of this release, contact Ruth Barnes (613-951-6190), Distributive Trades Division.

Sales by commodity, all retail stores

|  | $\begin{array}{r} \text { First } \\ \text { quarter } \\ 2005^{r} \end{array}$ | Fourth quarter $2005^{r}$ | $\begin{gathered} \text { First } \\ \text { quarter } \\ 2006^{p} \end{gathered}$ | First quarter <br> 2005 <br> to <br> first <br> quarter <br> 2006 |
| :---: | :---: | :---: | :---: | :---: |
|  | Unadjusted |  |  |  |
|  | \$ millions |  |  | \% change |
| Commodity |  |  |  |  |
| Food and beverages | 18,336 | 21,492 | 18,805 | 2.6 |
| Health and personal care products | 7,206 | 8,361 | 7,730 | 7.3 |
| Clothing, footwear and accessories | 5,541 | 9,948 | 5,934 | 7.1 |
| Furniture, home furnishings and electronics | 6,931 | 10,479 | 7,665 | 10.6 |
| Motor vehicles, parts and services | 17,309 | 18,778 | 18,147 | 4.8 |
| Automotive fuels, oils and additives | 7,275 | 8,843 | 8,308 | 14.2 |
| Housewares | 1,599 | 2,175 | 1,709 | 6.9 |
| Hardware, lawn and garden products | 4,041 | 5,966 | 4,574 | 13.2 |
| Sporting and leisure goods | 2,527 | 4,349 | 2,601 | 2.9 |
| All other goods and services | 6,857 | 8,201 | 7,220 | 5.3 |
| Total | 77,623 | 98,593 | 82,693 | 6.5 |

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p preliminary
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$r$ revised

## Steel primary forms, weekly data

Week ending July 8, 2006 (preliminary)
Steel primary forms production for the week ending July 8 totaled 298171 metric tonnes, down 4.6\% from 312479 tonnes a week earlier and up 18.1\% from 252480 tonnes in the same week of 2005.

The year-to-date total as of July 8 was 8270991 tonnes, up $0.8 \%$ from 8207394 tonnes in the same period of 2005.

Definitions, data sources and methods: survey number 2131.

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

## Dairy statistics <br> May 2006 (preliminary)

Dairy farmers sold almost 639300 kilolitres of milk and cream to dairies in May, down 3.2\% from May 2005.

Definitions, data sources and methods: survey numbers, including related surveys, 3430, 3431 and 3432.

The second quarter 2006 issue of The Dairy Review (23-001-XIB, free) and the new publication Dairy Statistics (23-014-XIE, free) will be available in August.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Anna Michalowska (613-951-2442 or toll free 1-800-465-1991; fax: 613-951-3868), Agriculture Division.

## Steel wire and specified wire products

May 2006
Data on steel wire and specified wire products production are now available for May.

Available on CANSIM: table 303-0047.
Definitions, data sources and methods: survey number 2106.

The May issue of Steel, Tubular Products and Steel Wire (41-019-XIE, free) will soon be available.

For more information, or to enquire about the concepts, methods or data quality of this release, contact the dissemination officer (1-866-873-8789;

613-951-9497; manufact@statcan.ca), Manufacturing, Construction and Energy Division.

## Monthly Survey of Large Retailers

May 2006
Data for the monthly survey of large retailers are now available for May.

Available on CANSIM: table 080-0009.
Definitions, data sources and methods: survey number 5027.

A data table is also available in the Canadian Statistics module online.

Data for the group of large retailers for June will be released on August 18.

For general information or to order data, contact Client Services (toll-free 1-877-421-3067; 613-951-3549; retailinfo @statcan.ca). To enquire about the concepts, methods or data quality of this release, contact Abdul Mohammed (613-951-7719), Distributive Trades Division.

## New products

Exports by Commodity, May 2006, Vol. 63, no. 5 Catalogue number 65-004-XPB ( $\$ 84 / \$ 828$ ).

Exports by Commodity, May 2006, Vol. 63, no. 5 Catalogue number 65-004-XMB ( $\$ 40 / \$ 387$ ).

Imports by Commodity, May 2006, Vol. 63, no. 5 Catalogue number 65-007-XPB ( $\$ 84 / \$ 828$ ).

Imports by Commodity, May 2006, Vol. 63, no. 5 Catalogue number 65-007-XMB (\$40/\$387).

## Movie Theatres and Drive-ins: Data <br> Tables, 2004/2005 <br> Catalogue number 87F0009XIE (free).

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