



The Daily

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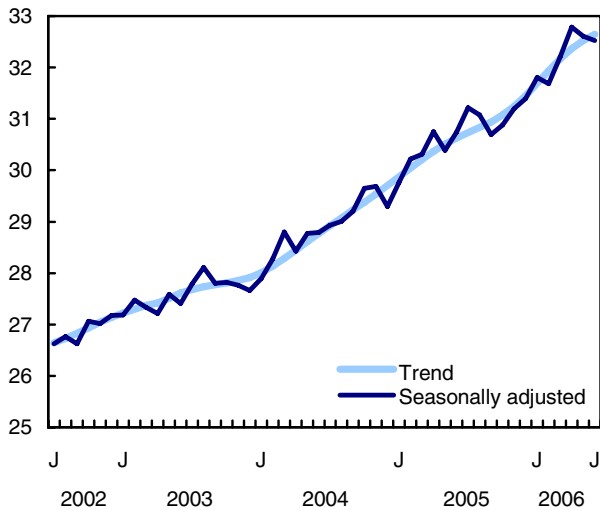
Retail trade

June 2006

Retail sales edged down for the second month in a row, slipping 0.2% to \$32.5 billion in June. Nevertheless, retail spending continued to grow at a fast rate in the second quarter (+2.3%), though sales were inflated by a spike in gasoline prices.

A strong quarter for retail sales despite recent declines

\$ billions



Keeping prices constant, retail sales edged up 0.2% in June as automobile prices fell.

Sales in the automotive sector fell for a second time in a row (-0.8%) after two strong increases in March (+3.5%) and April (+4.3%). Retail spending in the general merchandise sector, which includes department stores and other general merchandise stores, declined 1.4% in June.

These declines were partly offset by increased sales in pharmacies and personal care stores (+1.4%), which rose for the eighth consecutive month in June. Retail sales in the building and outdoor home supplies stores sector were 0.8% higher in June compared to May. Sales grew by 1.0% in the second quarter for retailers in this sector after a robust 5.4% increase in the first quarter.

Marginal gains or losses were experienced by furniture, home furnishings and electronic stores (+0.4%), food and beverage stores (+0.2%), clothing

and accessories stores (-0.2%) and miscellaneous retailers (+0.1%).

Excluding new car dealers and used and recreational motor vehicles and parts dealers, total retail sales remained relatively flat (+0.1%) in June.

Declines in the automotive and general merchandise stores sectors more than offset gains elsewhere

Sales in the automotive sector were largely pulled down by weaker sales at new car dealers (-1.4%) in June. Sales at used and recreational motor vehicle and parts dealers also slowed down (-0.7%) after large increases in March (+4.8%) and April (+8.1%).

Gasoline station sales remained steady (+0.1%) as prices showed relatively small changes in June (-0.4%), according to the Consumer Price Index.

Although sales in the automotive sector fell in June, this did not prevent quarterly sales in this sector from soaring 3.9% to the highest quarter-to-quarter increase in over four years. This gain was driven mainly by higher sales at gasoline stations and used and recreational motor vehicle and parts dealers. In contrast, sales at new car dealers have been generally flat since last fall.

The other major contributor to the decline in total retail sales in June was the slowdown in retail spending in general merchandise stores (-1.4%). This was the first drop in sales in 10 months for retailers in this sector. Since spiking in January (+3.5%), gains in this sector have been relatively moderate.

Pharmacies and personal care stores posted their highest year-over-year sales increase in 10 years (+13.2%) in June. Sales have declined only three times since June 2004. Sales of prescription drugs were the main driver for the growth in this sector. According to the Retail Commodity Survey, prescription drugs accounted for 55.0% of drug store sales in 2005, up sharply from 45.5% in 1998.

Within the building and outdoor home supplies stores sector, sales in home centres and hardware stores picked up again (+1.6%) after pausing for two months. Though the annual rate of increase has been declining since 2003, these types of stores have maintained double digit annual sales growth in the previous four years.

Sales down in most provinces

Sales were down in most provinces and territories in June, except for Ontario (+0.3%), Alberta (+0.5%) and Nunavut (+0.5%).

Retail sales in British Columbia fell 1.4% in June after gains of 1.4% in both April and May. In general, sales in this province have been growing steadily since 2004 after a period of relative flatness.

The Atlantic provinces all posted lower sales in June compared to May. The largest decline was in Nova Scotia (-3.8%), partly due to lower sales in the automotive sector. Sales in Prince Edward Island fell by 2.6%, in part due to lower sales at gasoline stations. Gasoline prices in Prince Edward Island posted the largest decline in June (-4.9%), according to the Consumer Price Index. Sales were down 1.2% in both Newfoundland and Labrador and New Brunswick.

Related indicators for July

Employment was unchanged for the second consecutive month in July, as gains in full-time employment were offset by similar declines in part-time employment. There was a jump in the number of people entering the labour force in search of work in July. This pushed the unemployment rate up 0.3 percentage points to 6.4%, still among the lowest in 30 years.

The seasonally adjusted annual rate of housing starts was 236,500 units in July, up a marginal 100 units from June, according to the Canada Mortgage and Housing Corporation.

Based on preliminary sales figures from the auto industry, the number of new motor vehicles sold rebounded by about 3% in July. These preliminary estimates indicate the increase was the result of truck sales rising after several months of declines. New passenger car sales, on the other hand, are estimated to have declined slightly in July.

Available on CANSIM: tables 080-0014 to 080-0017 and 076-0005.

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

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

Data on retail trade for July will be released on September 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

	June 2005	March 2006 ^r	April 2006 ^r	May 2006 ^r	June 2006 ^p	May to June 2006	June 2005 to June 2006
Seasonally adjusted							
	\$ millions					% change	
Automotive	10,562	10,997	11,466	11,212	11,118	-0.8	5.3
New car dealers	6,120	6,170	6,154	6,007	5,922	-1.4	-3.2
Used and recreational motor vehicle and parts dealers	1,291	1,430	1,545	1,521	1,510	-0.7	17.0
Gasoline stations	3,152	3,397	3,767	3,684	3,686	0.1	17.0
Furniture, home furnishings and electronics stores	2,114	2,301	2,272	2,306	2,314	0.4	9.5
Furniture stores	723	799	790	795	792	-0.4	9.5
Home furnishings stores	391	457	445	450	452	0.4	15.5
Computer and software stores	129	129	125	129	131	2.0	1.4
Home electronics and appliance stores	870	916	913	932	939	0.8	7.9
Building and outdoor home supplies stores	1,896	2,082	2,058	2,077	2,094	0.8	10.5
Home centres and hardware stores	1,515	1,687	1,687	1,687	1,715	1.6	13.2
Specialized building materials and garden stores	381	395	371	390	380	-2.5	-0.4
Food and beverage stores	7,232	7,300	7,361	7,328	7,345	0.2	1.6
Supermarkets	5,241	5,259	5,291	5,255	5,267	0.2	0.5
Convenience and specialty food stores	768	781	790	796	794	-0.2	3.3
Beer, wine and liquor stores	1,223	1,260	1,281	1,278	1,284	0.5	5.0
Pharmacies and personal care stores	1,980	2,142	2,170	2,212	2,242	1.4	13.2
Clothing and accessories stores	1,757	1,866	1,881	1,877	1,873	-0.2	6.6
Clothing stores	1,354	1,426	1,433	1,445	1,433	-0.8	5.8
Shoe, clothing accessories and jewellery stores	403	440	448	432	440	1.8	9.1
General merchandise stores	3,631	3,872	3,892	3,913	3,857	-1.4	6.2
Miscellaneous retailers	1,572	1,644	1,682	1,683	1,684	0.1	7.1
Sporting goods, hobby, music and book stores	772	826	840	835	835	0.0	8.2
Miscellaneous store retailers	800	818	842	848	849	0.2	6.1
Total retail sales	30,744	32,205	32,783	32,607	32,527	-0.2	5.8
Total excluding new car dealers, used and recreational motor vehicle and parts dealers	23,333	24,605	25,084	25,079	25,096	0.1	7.6
Provinces and territories							
Newfoundland and Labrador	489	484	504	500	494	-1.2	1.0
Prince Edward Island	120	125	123	124	121	-2.6	0.9
Nova Scotia	891	935	945	954	918	-3.8	3.0
New Brunswick	700	743	742	744	735	-1.2	4.9
Quebec	7,019	7,170	7,298	7,236	7,231	-0.1	3.0
Ontario	11,284	11,708	11,855	11,644	11,678	0.3	3.5
Manitoba	1,038	1,089	1,100	1,108	1,101	-0.7	6.1
Saskatchewan	936	955	988	983	976	-0.7	4.3
Alberta	4,032	4,531	4,701	4,724	4,746	0.5	17.7
British Columbia	4,129	4,358	4,418	4,480	4,419	-1.4	7.0
Yukon	37	36	38	38	38	-1.7	2.8
Northwest Territories	48	49	50	51	50	-1.2	5.5
Nunavut	21	21	21	21	21	0.5	-1.3

^r revised

^p preliminary

Retail sales

	June 2005	May 2006 ^r	June 2006 ^p	June 2005 to June 2006
	Unadjusted			
	\$ millions			% change
Automotive	12,219	13,133	12,952	6.0
New car dealers	7,325	7,224	7,157	-2.3
Used and recreational motor vehicle and parts dealers	1,606	2,069	1,890	17.7
Gasoline stations	3,288	3,840	3,906	18.8
Furniture, home furnishings and electronics stores	2,015	2,149	2,235	10.9
Furniture stores	748	783	820	9.7
Home furnishings stores	384	437	445	16.0
Computer and software stores	119	119	124	4.8
Home electronics and appliance stores	765	810	846	10.6
Building and outdoor home supplies stores	2,408	2,746	2,673	11.0
Home centres and hardware stores	1,891	2,192	2,160	14.2
Specialized building materials and garden stores	517	554	514	-0.7
Food and beverage stores	7,399	7,383	7,674	3.7
Supermarkets	5,317	5,312	5,458	2.7
Convenience and specialty food stores	817	835	855	4.7
Beer, wine and liquor stores	1,265	1,236	1,360	7.5
Pharmacies and personal care stores	1,959	2,247	2,251	14.9
Clothing and accessories stores	1,745	1,882	1,863	6.8
Clothing stores	1,339	1,438	1,426	6.5
Shoe, clothing accessories and jewellery stores	406	443	437	7.7
General merchandise stores	3,824	4,052	4,027	5.3
Miscellaneous retailers	1,578	1,665	1,683	6.6
Sporting goods, hobby, music and book stores	731	771	785	7.4
Miscellaneous store retailers	847	894	898	6.0
Total retail sales	33,147	35,257	35,359	6.7
Total excluding new car dealers, used and recreational motor vehicle and parts dealers	24,216	25,965	26,312	8.7
Provinces and territories				
Newfoundland and Labrador	538	543	551	2.5
Prince Edward Island	134	135	138	2.6
Nova Scotia	990	1,011	1,030	4.1
New Brunswick	773	809	816	5.5
Quebec	7,723	8,170	7,996	3.5
Ontario	12,120	12,509	12,669	4.5
Manitoba	1,122	1,188	1,211	8.0
Saskatchewan	1,010	1,077	1,074	6.3
Alberta	4,279	5,052	5,059	18.2
British Columbia	4,342	4,649	4,693	8.1
Yukon	43	42	44	4.3
Northwest Territories	52	50	54	3.9
Nunavut	21	22	22	2.3

^r revised

^p preliminary



Aircraft movement statistics

July 2006 (preliminary)

Aircraft take-offs and landings at the 42 Canadian airports with NAV CANADA air traffic control towers reached 438,663 movements last month, up 2.5% from the same month a year earlier (427,859 movements) and the fifth increase in seven months. Aircraft take-offs and landings, however, remained well below (-17.7%) the peak recorded in July 1998 (533,190 movements).

Year-over-year increases in aircraft movements were reported by 31 of these airports. The variations ranged from an increase of 33.3% for Winnipeg/St. Andrews to a decline of 20.9% for Windsor.

The July 2006 issue of *Aircraft Movement Statistics*, Vol. 5, no. 7 (51F0001PIE, TP1496, free) is now available from the *Publications* module of our website.

Preliminary statistics for the 56 Canadian airports with NAV CANADA flight service stations are also available for July.

Available on CANSIM: table 401-0005.

Definitions, data sources and methods: survey number 2715.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Kathie Davidson (613-951-0141; fax: 613-951-0010; aviationstatistics@statcan.ca), Transportation Division. ■

Crushing statistics

July 2006

Oilseed processors crushed 315 776 metric tonnes of canola in July. Oil production totalled 136 346 tonnes while meal production amounted to 181 745 tonnes.

During the 2005/2006 crop year, a record 3 422 621 metric tonnes of canola were crushed, 1% higher than the previous record set in 2003/2004 when 3 389 554 tonnes were crushed.

Available on CANSIM: table 001-0005.

Definitions, data sources and methods: survey number 3404.

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

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. ■

Deliveries of major grains

July 2006

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

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

June 2006

The June 2006 issue of *Cereals and Oilseeds Review*, Vol. 29, no. 6 (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 general information, contact Client Services (toll-free 1-800-465-1991; agriculture@statcan.ca). To enquire about the concepts, methods or data quality of this release, contact Karen Gray (204-951-2074; karen.gray@statcan.ca), Agriculture Division. ■

Shipments of solid fuel burning heating products

Second quarter 2006

Data on shipments of solid fuel burning heating products are now available for the second quarter.

Available on CANSIM: table 303-0063.

Definitions, data sources and methods: survey number 2189.

the dissemination officer (toll-free 1-866-873-8789; 613-951-9497; *manufact@statcan.ca*), Manufacturing, Construction and Energy Division. ■

For more information, or to enquire about the concepts, methods or data quality of this release, contact

New products

Cereals and Oilseeds Review, June 2006, Vol. 29, no. 6
Catalogue number 22-007-XIB
 (free).

Aircraft Movement Statistics, July 2006, Vol. 5, no. 7
Catalogue number 51F0001PIE
 (free).

Wholesale Trade, June 2006, Vol. 69, no. 6
Catalogue number 63-008-XIE
 (free).

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