



# The Daily

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## New products

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## Releases

### Retail trade

January 2007

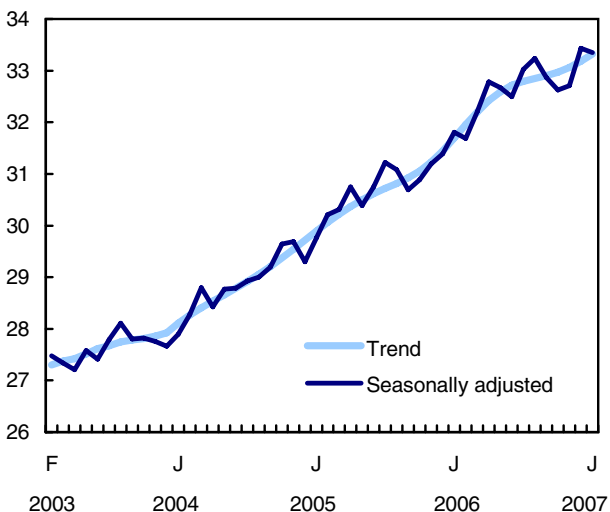
Despite a downturn in sales of automobiles and gasoline in January, especially in Ontario, retail sales fell back only slightly from the previous month's high.

Total retail sales fell 0.2% in January to an estimated \$33.4 billion, mainly due to the 2.4% sales decline in the automotive sector. Excluding the automotive sector, retail sales rose by 0.9%.

The automotive sector tends to dictate which direction overall retail sales go on a monthly basis. However, both the automotive sector and the non-automotive sectors have contributed about the same to overall growth on an annual basis. Sales growth in the non-automotive sectors averaged 5.6% in the past five years while overall retail sales growth averaged 5.4% in the same period.

#### Retail sales fell back on trend in January after strong growth in December

\$ billions



Partially offsetting the January decline in the automotive sector were widespread gains in all other sectors. Strong sales increases were seen in the furniture, home furnishings and electronic stores (+2.1%), clothing and accessories stores (+1.6%) and pharmacies and personal care stores (+1.5%) sectors.

Moderate increases were seen in general merchandise stores (+1.0%), building and outdoor home supplies stores (+1.0%), miscellaneous retailers (+0.8%), and food and beverage stores (+0.1%).

Overall price effects were minimal in January as the declines in gasoline prices were offset by increases in other items, such as clothing and alcoholic beverages. Once price changes were taken into account, total retail sales fell by 0.2%.

#### Automotive sector puts the brakes on retail sales

The price of gasoline fell by 3.1% in January from December, according to the Consumer Price Index, leading to a 3.5% drop in sales at gasoline stations in January, after two months of strong sales gains.

Sales at new car dealers fell by 2.0%, after a 3.4% increase in December. Demand for new passenger cars and trucks declined by 3.3% in January, according to the New Motor Vehicles Sales Survey. In general, sales at new car dealers have been rising since mid-2006 after a period of offsetting declines and increases.

In the furniture, home furnishings and electronic stores sector, furniture stores sales rose by 4.5% in January. Consumer shopping trends at these types of stores appear to be changing in the last couple of years as sales over the holiday season continue to flood over to January, possibly due to the proliferation of gift cards.

Sales at beer, wine and liquor stores increased by 3.7% in January, more than offsetting the declines in November and December. Annual sales growth at these stores in 2006 was 5.5%, the highest growth rate in four years. In contrast, supermarket sales fell by 1.0% in January, after increasing by 0.9% in December. Sales at supermarkets have been relatively flat in 2006, as they experienced their lowest year of sales gains (+0.6%) since 1996.

After several months of large sales fluctuations, recently affected by deviations from normal weather patterns, sales at clothing stores continued to climb in January (+3.0%), making up for the lost sales in October and November. Shoe, clothing accessories and jewellery stores fell by 2.7%, partially due to a larger than usual sales decline at jewellery stores.

Pharmacies and personal care stores sales increased for the third consecutive month (+1.5%) in January. These stores saw phenomenal annual growth in 2006, reaching double digits for the first time since this series began (+10.8%) in 1991.

### **Sales in Ontario fall back on trend after strong December sales**

Overall, 11 out of 13 provinces and territories experienced sales gains in January. Sales in Ontario fell by 2.1% after a strong 3.0% increase in December. The decline was mainly due to lower sales at new car dealers and gasoline stations. The Ontario retail sales trend has been relatively flat for most of 2006. New Brunswick (-1.1%) also experienced sales declines in January.

Retailers in the Prairie provinces did well in January with an average of 1.3% sales growth among the three provinces. Sales in Saskatchewan continued to be strong in January (+1.7%) after a 2.4% increase in December.

Manitoba's retail sales growth of 1.2% in January was the third monthly increase in a row. Sales in this province had been steadily increasing with only two monthly declines in 2006.

Retailers in Alberta experienced a 1.2% increase in January, rising from a short period of flatness. In 2006, retail sales in Alberta reached the highest double-digit growth ever recorded for any province (+16.1%) since the series began in 1991.

Retail sales in British Columbia continued to rise in January (+1.5%), continuing an upward trend after a pause in November.

### **Related indicators for February**

Estimates from the Labour Force Survey show little overall change in the labour market in February

as employment edged up slightly (+14,000). The unemployment rate edged down 0.1 percentage points to 6.1%.

Based on preliminary sales data from the automotive industry, the number of new motor vehicles sold in February declined approximately 4% due to lower sales for both passenger cars and trucks.

The seasonally adjusted annual rate of housing starts was 196,200 units in February, down from 248,500 units in January, according to Canada Mortgage and Housing Corporation.

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

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

The January 2007 issue of *Retail Trade* (63-005-XWE, free) will soon be available.

Data on retail trade for February will be released on April 20.

For more information or to order data, contact Client Services (toll-free 1-877-421-3067; 613-951-3549; [retailinfo@statcan.ca](mailto: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

	January 2006	October 2006 <sup>r</sup>	November 2006 <sup>r</sup>	December 2006 <sup>r</sup>	January 2007 <sup>p</sup>	December 2006 to January 2007	January 2006 to January 2007
Seasonally adjusted							
	\$ millions				% change		
<b>Automotive</b>	<b>10,898</b>	<b>10,965</b>	<b>11,190</b>	<b>11,602</b>	<b>11,325</b>	<b>-2.4</b>	<b>3.9</b>
New car dealers	6,147	6,312	6,361	6,577	6,446	-2.0	4.9
Used and recreational motor vehicle and parts dealers	1,367	1,463	1,471	1,509	1,486	-1.5	8.7
Gasoline stations	3,383	3,190	3,359	3,516	3,392	-3.5	0.2
<b>Furniture, home furnishings and electronics stores</b>	<b>2,306</b>	<b>2,335</b>	<b>2,355</b>	<b>2,369</b>	<b>2,418</b>	<b>2.1</b>	<b>4.9</b>
Furniture stores	822	806	812	810	846	4.5	2.9
Home furnishings stores	448	449	462	471	468	-0.6	4.4
Computer and software stores	139	126	126	130	131	0.9	-5.6
Home electronics and appliance stores	897	955	955	959	973	1.5	8.5
<b>Building and outdoor home supplies stores</b>	<b>2,037</b>	<b>2,108</b>	<b>2,130</b>	<b>2,186</b>	<b>2,208</b>	<b>1.0</b>	<b>8.4</b>
Home centres and hardware stores	1,646	1,714	1,736	1,769	1,787	1.0	8.6
Specialized building materials and garden stores	391	394	394	417	421	0.9	7.7
<b>Food and beverage stores</b>	<b>7,163</b>	<b>7,389</b>	<b>7,380</b>	<b>7,394</b>	<b>7,399</b>	<b>0.1</b>	<b>3.3</b>
Supermarkets	5,144	5,280	5,276	5,322	5,268	-1.0	2.4
Convenience and specialty food stores	771	813	815	799	810	1.4	5.1
Beer, wine and liquor stores	1,248	1,296	1,290	1,273	1,320	3.7	5.8
<b>Pharmacies and personal care stores</b>	<b>2,073</b>	<b>2,263</b>	<b>2,268</b>	<b>2,282</b>	<b>2,316</b>	<b>1.5</b>	<b>11.7</b>
<b>Clothing and accessories stores</b>	<b>1,808</b>	<b>1,931</b>	<b>1,877</b>	<b>1,972</b>	<b>2,004</b>	<b>1.6</b>	<b>10.8</b>
Clothing stores	1,380	1,468	1,428	1,499	1,544	3.0	11.8
Shoe, clothing accessories and jewellery stores	428	462	449	473	460	-2.7	7.6
<b>General merchandise stores</b>	<b>3,843</b>	<b>3,937</b>	<b>3,862</b>	<b>3,954</b>	<b>3,992</b>	<b>1.0</b>	<b>3.9</b>
<b>Miscellaneous retailers</b>	<b>1,677</b>	<b>1,694</b>	<b>1,648</b>	<b>1,678</b>	<b>1,692</b>	<b>0.8</b>	<b>0.9</b>
Sporting goods, hobby, music and book stores	858	861	830	860	863	0.5	0.7
Miscellaneous store retailers	819	833	818	819	829	1.2	1.2
<b>Total retail sales</b>	<b>31,806</b>	<b>32,623</b>	<b>32,710</b>	<b>33,438</b>	<b>33,354</b>	<b>-0.2</b>	<b>4.9</b>
<b>Total excluding new car dealers, used and recreational motor vehicle and parts dealers</b>	<b>24,292</b>	<b>24,849</b>	<b>24,879</b>	<b>25,352</b>	<b>25,421</b>	<b>0.3</b>	<b>4.7</b>
<b>Provinces and territories</b>							
Newfoundland and Labrador	514	505	520	534	536	0.2	4.1
Prince Edward Island	123	122	125	129	130	0.8	5.2
Nova Scotia	933	930	941	956	960	0.4	2.9
New Brunswick	724	726	746	769	761	-1.1	5.0
Quebec	7,048	7,217	7,265	7,366	7,383	0.2	4.7
Ontario	11,620	11,662	11,741	12,091	11,833	-2.1	1.8
Manitoba	1,047	1,097	1,119	1,127	1,140	1.2	8.9
Saskatchewan	940	975	977	1,000	1,017	1.7	8.2
Alberta	4,425	4,803	4,784	4,861	4,920	1.2	11.2
British Columbia	4,323	4,474	4,382	4,493	4,559	1.5	5.5
Yukon	36	39	37	40	40	0.1	11.6
Northwest Territories	51	50	51	52	53	1.0	4.3
Nunavut	21	22	22	21	24	11.8	12.6

<sup>r</sup> revised

<sup>p</sup> preliminary

**Retail sales**

	January 2006	December 2006 <sup>r</sup>	January 2007 <sup>p</sup>	January 2006 to January 2007
Unadjusted				
	\$ millions			% change
<b>Automotive</b>	<b>8,744</b>	<b>9,878</b>	<b>9,179</b>	<b>5.0</b>
New car dealers	4,716	5,452	5,049	7.1
Used and recreational motor vehicle and parts dealers	955	1,118	1,046	9.5
Gasoline stations	3,072	3,308	3,084	0.4
<b>Furniture, home furnishings and electronics stores</b>	<b>1,997</b>	<b>3,558</b>	<b>2,143</b>	<b>7.3</b>
Furniture stores	703	935	747	6.2
Home furnishings stores	377	623	401	6.5
Computer and software stores	144	159	140	-3.2
Home electronics and appliance stores	773	1,841	855	10.6
<b>Building and outdoor home supplies stores</b>	<b>1,394</b>	<b>1,753</b>	<b>1,564</b>	<b>12.2</b>
Home centres and hardware stores	1,147	1,435	1,287	12.3
Specialized building materials and garden stores	248	318	277	11.7
<b>Food and beverage stores</b>	<b>6,352</b>	<b>8,814</b>	<b>6,615</b>	<b>4.1</b>
Supermarkets	4,813	6,009	4,956	3.0
Convenience and specialty food stores	661	876	702	6.2
Beer, wine and liquor stores	878	1,928	958	9.0
<b>Pharmacies and personal care stores</b>	<b>1,993</b>	<b>2,670</b>	<b>2,256</b>	<b>13.2</b>
<b>Clothing and accessories stores</b>	<b>1,297</b>	<b>3,347</b>	<b>1,456</b>	<b>12.3</b>
Clothing stores	1,003	2,442	1,133	12.9
Shoe, clothing accessories and jewellery stores	294	905	323	9.9
<b>General merchandise stores</b>	<b>2,966</b>	<b>5,992</b>	<b>3,160</b>	<b>6.6</b>
<b>Miscellaneous retailers</b>	<b>1,434</b>	<b>2,518</b>	<b>1,484</b>	<b>3.4</b>
Sporting goods, hobby, music and book stores	758	1,511	780	2.9
Miscellaneous store retailers	677	1,007	704	4.0
<b>Total retail sales</b>	<b>26,178</b>	<b>38,531</b>	<b>27,857</b>	<b>6.4</b>
<b>Total excluding new car dealers, used and recreational motor vehicle and parts dealers</b>	<b>20,507</b>	<b>31,961</b>	<b>21,763</b>	<b>6.1</b>
<b>Provinces and territories</b>				
Newfoundland and Labrador	395	633	420	6.5
Prince Edward Island	94	149	100	7.4
Nova Scotia	756	1,138	791	4.6
New Brunswick	581	877	620	6.7
Quebec	5,664	8,027	5,987	5.7
Ontario	9,631	14,340	9,973	3.5
Manitoba	854	1,286	938	9.8
Saskatchewan	771	1,132	848	9.9
Alberta	3,656	5,541	4,148	13.4
British Columbia	3,688	5,281	3,935	6.7
Yukon	28	43	31	12.7
Northwest Territories	42	59	46	9.1
Nunavut	18	25	20	12.3

<sup>r</sup> revised

<sup>p</sup> preliminary



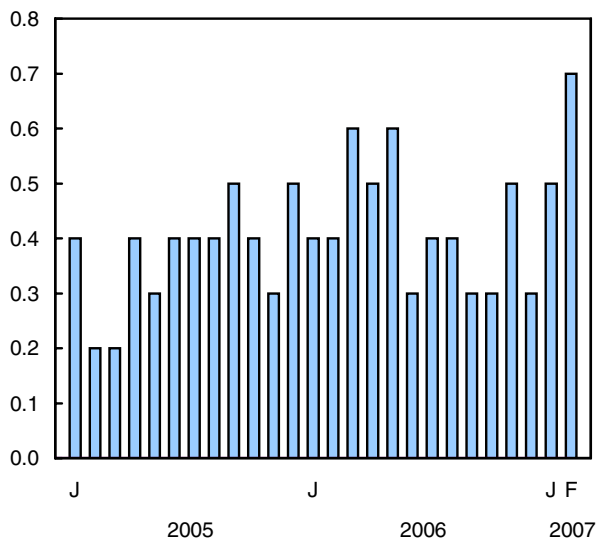
## Leading indicators

February 2007

The composite index rose 0.7% in February, topping its 0.5% gain at the start of the year. Growth was led by a pickup in new orders for manufactured goods and continued strong consumer spending and financial markets. Only 1 of the 10 components fell in both January and February.

### Composite leading indicator

Smoothed % change



Consumer demand for durable goods remained buoyant at the turn of the year. Robust labour market conditions and lower gas prices fuelled strong growth in real incomes. However, housing retreated sharply in February, as a return to seasonable winter conditions followed the unusually balmy conditions that had boosted starts and sales in the previous two months.

Financial market conditions continued to improve. The stock market hit new highs early in the new year, before its recent slip. The optimistic outlook for firms was reflected in investment intentions. Firms plan to spend 5% more in 2007, their fourth straight year of strong growth. Almost all sectors plan to boost investment, with energy again leading the way as gains for utilities and the oil sands offset cuts by natural gas producers.

New orders for durable manufactured goods jumped 1.8%, their largest monthly advance in over two years. A rebound in transportation equipment led the upturn. The increase in demand already had started to be reflected in higher output and shipments late in 2006, although not enough to reverse the drop in the ratio of shipments to inventories. Manufacturers remained cautious about their labour demand, as the workweek stayed the same while layoffs multiplied.

The US leading indicator rose 0.2%, continuing its gradual recovery from declines in the second half of 2006. Continued strong labour market conditions were reflected in higher consumer confidence. Industrial production rebounded sharply in February, led by a recovery in autos and the need for power as cold temperatures lingered.

**Available on CANSIM: table 377-0003.**

**Definitions, data sources and methods: survey number 1601.**

For more information on the economy, consult the March 2007 issue of *Canadian Economic Observer*, Vol. 20, no. 3 (11-010-XIB, free), now available from the *Publications* module of our website. A printed version (11-010-XPB, \$25/\$243) is also available. See *How to order products*.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Philip Cross (613-951-9162; [ceo@statcan.ca](mailto:ceo@statcan.ca)), Current Economic Analysis Group. □

## Leading indicators

	September 2006	October 2006	November 2006	December 2006	January 2007	February 2007	Last month of data available % change
<b>Composite leading indicator (1992=100)</b>	<b>218.6</b>	<b>219.3</b>	<b>220.4</b>	<b>221.0</b>	<b>222.1</b>	<b>223.7</b>	<b>0.7</b>
Housing index (1992=100) <sup>1</sup>	141.3	140.4	139.8	139.2	143.3	144.3	0.7
Business and personal services employment ('000)	2,747	2,756	2,768	2,781	2,794	2,805	0.4
S&P/TSX stock price index (1975=1,000)	11,810	11,930	12,158	12,373	12,565	12,817	2.0
Money supply, M1 (\$ millions, 1992) <sup>2</sup>	151,629	153,439	155,228	157,277	159,525	162,079	1.6
US Conference Board leading indicator (1992=100) <sup>3</sup>	126.8	126.7	126.7	126.6	126.8	127.1	0.2
<b>Manufacturing</b>							
Average workweek (hours)	38.4	38.4	38.5	38.4	38.4	38.4	0.0
New orders, durables (\$ millions, 1992) <sup>4</sup>	26,031	25,758	26,098	25,867	25,943	26,407	1.8
Shipments/inventories of finished goods <sup>4</sup>	1.87	1.87	1.85	1.83	1.82	1.81	-0.01 <sup>5</sup>
<b>Retail trade</b>							
Furniture and appliance sales (\$ millions, 1992) <sup>4</sup>	2,550	2,568	2,589	2,604	2,614	2,631	0.7
Other durable goods sales (\$ millions, 1992) <sup>4</sup>	8,590	8,685	8,729	8,757	8,800	8,859	0.7
<b>Unsmoothed composite leading indicator</b>	<b>218.8</b>	<b>221.6</b>	<b>222.6</b>	<b>222.3</b>	<b>225.3</b>	<b>226.5</b>	<b>0.5</b>

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 the second preceding month.

5. Difference from previous month.

## Railway carloadings

January 2007

Railway carloadings totalled 23.1 million metric tonnes in January, up 1.3% from the 22.8 million metric tonnes loaded in December 2006.

Commodities reported under the non-intermodal category rose from 20.6 million tonnes to 20.9 million tonnes, up 1.5% from December, while loadings of containers and trailers on flat cars remained at 2.2 million tonnes.

On a commodity basis, loadings of forest and paper products have, for the first time since February 2006, all shown an increase in loadings. Overall, forest and paper products went up by 9.6% from December 2006, an increase of 4,410 carloads.

On the agricultural front, the increase in "Other cereal grains", primarily consisting of barley and oats, counterbalanced the drop in wheat loadings.

Coal loadings were down for the third consecutive month, falling by more than 3,600 carloads in January. On the other hand, loadings of fuel oils and crude petroleum reached a new four-year high as January loadings totalled 6,355 carloads, a 17.9% increase over December 2006.

Loadings related to the iron and steel manufacturing sector showed signs of recovery from the three-year

low reported in November 2006, as loadings reported in January reached a seven year summit of 6,444 carloads.

Automobiles and mini-vans were up 5.3% from December 2006. However, when compared to last January, loadings were down 2.5%.

Finally, freight coming from the United States, either destined for or passing through Canada, held steady at 2.5 million tonnes.

On a year over-year-basis, non-intermodal tonnage fell 1.2% from January 2006 while intermodal loadings rose 1.7%. Traffic received from the United States went up 4.1%.

**Available on CANSIM: table 404-0002.**

**Definitions, data sources and methods: survey number 2732.**

The January 2007 issue of *Monthly Railway Carloadings*, Vol. 84, no. 1 (52-001-XWE, free) is now available from the *Publications* module of our website.

For more information, or to enquire about the concepts, methods or data quality of this release, contact the Dissemination Unit (toll-free 1-866-500-8400; fax: 613-951-0009; [transportationstatistics@statcan.ca](mailto:transportationstatistics@statcan.ca)), Transportation Division.

## Rail transportation

2005 (preliminary)

The Canadian rail transportation industry reported sharply rising revenues in 2005, as freight volume increased.

Operating revenues for the Canadian rail transportation industry rose 10.8% from 2004 to \$9.8 billion in 2005. This was achieved as a result of a favourable economic climate, increases in exports of raw materials and imports of finished goods (particularly from China and other Asian countries).

Freight transportation revenues, which accounted for 89.2% of total operating revenues, went up 11.2% to \$8.8 billion. Passenger operations accounted for an additional 2.9% of total operating revenues.

The rail industry's operating expenses rose 8.0% to \$7.5 billion in 2005, primarily the result of higher costs for rail operations and general expenses categories.

Total assets reached \$18.7 billion in 2005, showing the capital intensive nature of the industry.

On the basis of origin and destination traffic, railways carried 280.6 million tonnes of commodities, up 3.4% from 2004. Overall, 10 commodities accounted for 58.2% of all commodities for all origins and destinations in 2005.

Coal remained the main commodity transported, with a tonnage increase of 5.3%, accounting for 12.2% of total tonnage in 2005. Higher international demand for this commodity explains in part the increase recorded in 2005.

The number of employees fell from 35,591 in 2004 to 34,995 in 2005. This result follows the downward trend that began many decades ago. The average annual salary in 2005 was almost \$71,000.

The total number of passengers travelling by rail increased 5.2% over 2004 to 4.3 million passengers. However, the length of a passenger journey decreased by 1.4% compared to 2004. The average passenger journey was 346 kilometres in 2005.

At the same time, passenger revenues increased from \$265.2 million to \$282.9 million.

Between 2001 and 2005, passenger revenues rose 5.4%.

VIA Rail accounted for 90.4% of all revenue from rail passenger transportation. The remainder was shared by CN, CP and the regional and short-haul carriers. VIA Rail also received 54.7% of total government payments that went to the rail industry.

**Definitions, data sources and methods: survey numbers, including related surveys, 2734 and 2736.**

The publication *Rail in Canada, 2005* (52-216-XWE, free) is now available from the *Publications* module of our website.

To obtain data or more information, or to enquire about the concepts, methods or data quality of this release, contact the Dissemination Unit (toll-free 1-866-500-8400; [transportationstatistics@statcan.ca](mailto:transportationstatistics@statcan.ca)), Transportation Division. ■

## Large urban transit

January 2007 (preliminary)

Combined ridership on 10 large urban transit systems in Canada was 8.4% higher in January 2007 than it was for the same month in 2006.

Approximately 119.5 million passenger trips were taken on these transit systems in January. These systems account for about 80% of total urban transit in Canada.

The trips generated \$193.2 million in revenue in January (excluding subsidies), an 11.5% increase over January 2006.

**Available on CANSIM: table 408-0004.**

**Definitions, data sources and methods: survey number 2745.**

For more information, or to enquire about the concepts, methods or data quality of this release, contact the Dissemination Unit (toll-free 1-866-500-8400; fax: 1-613-951-0009; [transportationstatistics@statcan.ca](mailto:transportationstatistics@statcan.ca)), Transportation Division. ■



## New products

**Monthly Railway Carloadings**, January 2007, Vol. 84,  
no. 1  
**Catalogue number 52-001-XWE**  
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**Rail in Canada, 2005**  
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