



A WEEKLY REVIEW

OVERVIEW

Seasonally adjusted retail sales rose 0.8% in December, offsetting most of the cumulative decline recorded in the previous four months.

After declining for eight months, sales of wholesale merchants rose 0.5% to \$14.8 billion in November.

Shipments were down 0.3% in December, following a sharp decrease in November.

In the aggregate, the value of exports and imports did not vary greatly from November to December, although large offsetting changes took place for selected commodities.

In the fourth quarter, international travel transactions produced a record seasonally adjusted deficit in the travel account.

Farm cash receipts for January to December 1990 fell 4% from the previous year's level, to \$21.7 billion.

In December, seasonally adjusted retail sales increased by 0.8% to \$16.2 billion as consumers took advantage of pre-GST savings. This first monthly gain since July offset most of the cumulative decline registered in the previous four months.

The six trade groups related to apparel and furniture, appliances and furnishings reported substantially higher sales. Household furniture and appliance stores registered a second consecutive gain (13.2%), following generally declining sales in the previous eight months. A 1.7% increase for general merchandise stores followed a decline of 0.7% in November. Sales by motor vehicle and recreational vehicle dealers fell for the sixth consecutive month, a cumulative drop of 9.2%. Gasoline service stations' sales, which had shot up by 10.7% in October and increased slightly in November, declined by 1.6%.

Retail Trade

Month	Temperature (°C)
Jan 1989	15.6
Feb 1989	15.8
Mar 1989	15.8
Apr 1989	16.0
May 1989	16.2
Jun 1989	16.0
Jul 1989	16.2
Aug 1989	16.4
Sep 1989	16.2
Oct 1989	16.2
Nov 1989	16.3
Dec 1989	16.4
Jan 1990	16.5
Feb 1990	16.4
Mar 1990	16.4
Apr 1990	16.2
May 1990	16.0
Jun 1990	16.2
Jul 1990	16.2
Aug 1990	16.1
Sep 1990	16.0
Oct 1990	16.1
Nov 1990	16.0
Dec 1990	16.2

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... Retail Sales Increase

Sales were unchanged in Saskatchewan. All other provinces reported higher sales, with gains ranging from 3.1% in British Columbia to 0.2% in New Brunswick. Together, the Yukon and the Northwest Territories recorded a decline of 2.2%.

For further information, order *Retail Trade Catalogue number 63-005* or contact *Industry Division* at (613) 951-3552.

Wholesale Trade Up

In November, seasonally adjusted sales of wholesale merchants rose 0.5% to \$14.8 billion. This gain followed average monthly declines of 1.0% in the previous eight months.

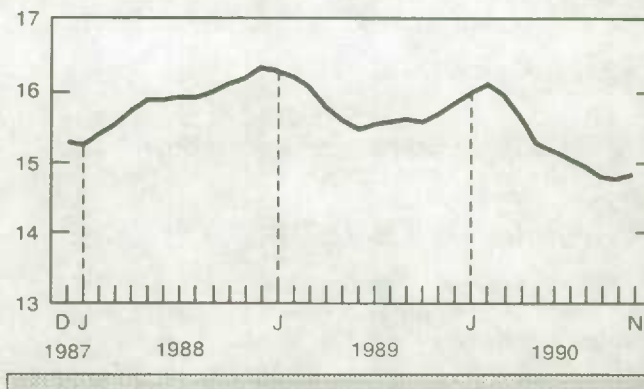
Four of the nine trade groups registered higher sales in November. Sales by wholesalers of non-farm machinery, equipment and supplies rose 2.7%, the second consecutive increase. Wholesalers of food, beverage, drug and tobacco products posted a 1.2% increase; sales for this group were at a record level.

Sales of wholesalers of lumber and building materials continued to decline (-2.3%) and were 17.2% lower than their November 1989 level. Sales of apparel and dry goods dropped 3.9%, contributing to a cumulative fall of 25.0% from the April level.

For further information, order *Wholesale Trade* (catalogue number 63-008) or contact *Industry Division* at (613) 951-3540.

Wholesale Trade

Billions of dollars, seasonally adjusted



Shipments Maintain Downward Trend

Following a sharp decrease in November, shipments fell 0.3% in December to \$23.9 billion, 6.7% below their September 1989 peak. Decreases in transportation equipment (-2.4%) and wood industries (-6.8%) were partly offset by an increase in the electrical and electronic products industry (8.0%).

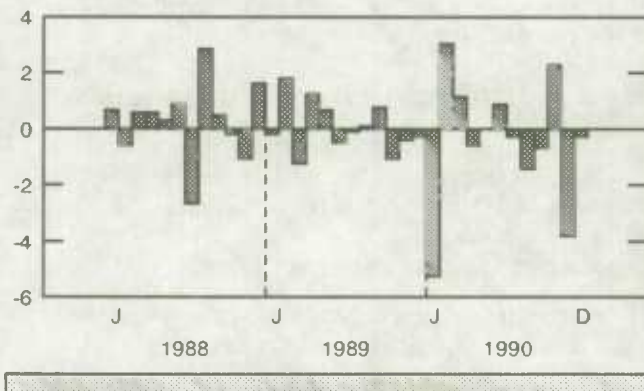
Inventories rose 0.4% to \$37.5 billion and were 1.3% above their July level. A major increase in the refined petroleum and coal products industry (8.3%) and a gain for the chemical products industry (2.2%) were partly offset by decreases for fabricated metal products, electrical and electronic products and wood industries.

The inventories to shipments ratio increased from 1.56 in November to 1.57 in December.

Unfilled orders decreased by 0.8% to \$26.9 billion, 13.5% below their February 1989 peak. New orders fell 0.6%, following average monthly declines of 0.9% in the five previous months.

Shipments

% change, previous month



For further information, order *Monthly Survey of Manufacturing* (catalogue number 31-001) or contact *Industry Division* at (613) 951-9497.

Offsetting Movements Leave Merchandise Trade Figures Unchanged

In the aggregate, the value of exports and imports did not vary greatly from November to December, although large offsetting changes took place for selected commodities.

Exports fell by 0.4%. Automotive products posted another large decline (-4.4%) after their sharp decline in November. Exports of industrial goods and materials dropped for the second consecutive month, this time by 4.5%. Exports of forestry products decreased by 5.8%, more than offsetting the increase in November. Energy product exports fell, largely due to lower crude oil prices. Exports of wheat more than doubled, moderating decreases for other commodities.

Imports rose by 0.2%, after a sharp drop in November. Imports of machinery and equipment rose 0.8%, but were still 14.1% below their 1990 peak reached in May. Forestry products posted an increase of 8.9%, not quite offsetting the decline in October. Imports of other consumer goods (excluding cars and agricultural products) increased 4.2%, after a decline in November. Imports of cars rose by 30.1%, but this was more than offset by a decline of 24.8% for parts.

In step with the economic slowdown in the United States, exports to that country dropped by 4.0% to \$8.9 billion, their lowest level since February.

For further information, order Preliminary Statement of International Trade (catalogue number 65-001P) or contact International Trade Division at (613) 951-9647.

Record Travel Account Deficit

In the fourth quarter, international travel transactions produced a record seasonally adjusted deficit in the travel account.

Payments to the United States increased 3.8% from the previous quarter to \$2.0 billion, maintaining their upward trend. Spending in all countries other than the United States dropped 3.3% to \$1.1 billion, the first decline in over two years.

Receipts from the United States and receipts from all other countries both increased by 1.3%, following a decline in the previous quarter.

After showing a marked improvement during Expo 86, the travel account deficit has maintained a generally downward trend since, with the only exception being the slight recovery brought by the Winter Olympics in the first quarter of 1988.

For further information, order Travel Between Canada and Other Countries (catalogue number 66-001) or contact Education, Culture and Tourism Division at (613) 951-8933.

Farm Cash Receipts Decline

Farm cash receipts for January to December 1990 fell 4% from the previous year's level to \$21.7 billion. This was the first decline since 1985.

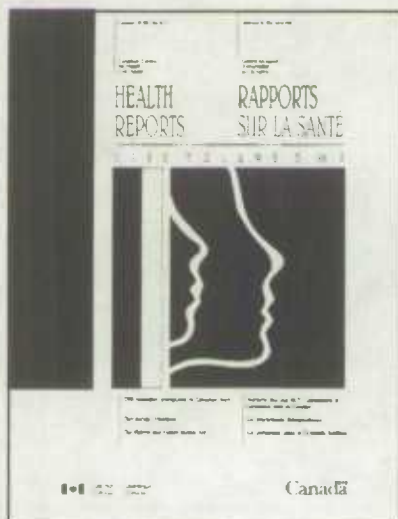
Direct program payments fell 42% from 1989, to \$1.9 billion, the lowest level since 1985. Declines were registered in all major programs, but over \$1 billion of the drop was due to lower crop insurance, tripartite and other (ad hoc) programs.

Livestock and animal products receipts rose 4.7% to a record level of \$11.3 billion. Cattle receipts rose 5% to a record \$3.7 billion. The number of slaughtered cattle declined by 7%, while the number of animals exported increased by 81%. Hog receipts were at their highest level since 1987, increasing by 13% to \$2 billion. Poultry receipts rose 5.5% to \$1.2 billion. Farm prices for hens, chickens and turkeys remained stable, but marketings increased.

Crop receipts remained unchanged at \$8.5 billion. Wheat receipts rose 24.3% to \$2.7 billion despite an 8% drop in prices. Canadian Wheat Board payments for wheat were below the year earlier level, partly because of the timing of payments for the 1988\1989 crop year, some of which were made in 1989 while they usually would have been made 1990. Canola and barley receipts dropped 19% and 21% respectively, due to lower prices and marketings.

For further information, order Farm Cash Receipts (catalogue number 21-001) or contact Agriculture Division at (613) 951-8706.

NEW FROM STATISTICS CANADA



Health Reports

The latest issue of *Health Reports* offers convenient access to essential data addressing many topical issues of the health field in Canada.

It contains new data on cancer, marriages, tuberculosis, quarterly hospital indicators and post-censal population estimates. This issue also features analytical articles on cardiovascular disease of immigrants and Canadians, therapeutic abortions, health and support systems of the elderly and disability among Aboriginal Canadians.

Highlights of the publication include:

- One in six Canadians was born outside Canada. For both men and women, first generation immigrants tend to have lower rates of cardiovascular disease than those born in Canada.
- Elderly persons who enjoy a high level of social support, especially family aid, are twice as likely to report excellent or good health as those receiving little support.
- It is estimated that 10% of Aboriginal Canadians living on reserves and 13% of those living off reserves are disabled.

For further information, order Health Reports (catalogue number 82-003) or contact the Canadian Centre for Health Information at (613) 951-1746.

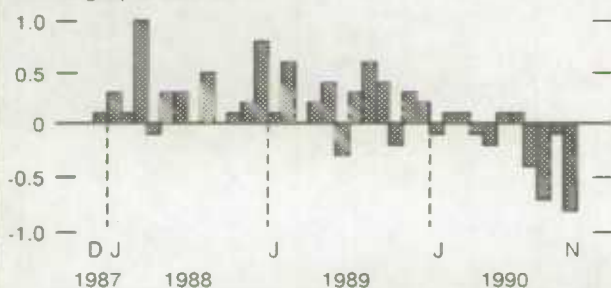
PUBLICATIONS RELEASED FROM FEBRUARY 15 TO 21, 1991

Division/title	Period	Catalogue Number	Price: Issue/Subscription		
			Canada (\$Cdn.)	United States	Other Countries
				\$US	
AGRICULTURE					
Cereals and Oilseeds Review	November 1990	22-007	13.80/138	16.60/166	19.30/193
CURRENT ANALYSIS					
Canadian Economic Observer	February 1991	11-010	22/220	26/260	31/310
EDUCATION, CULTURE AND TOURISM					
Touriscope - International Travel - Advance Information	December 1990	66-001P	6.10/61	7.30/73	8.50/85
HEALTH					
Health Reports, Vol. 2, No. 3	Third Quarter 1990	82-003	26/104	31.25/125	36.50/146
HOUSEHOLD SURVEYS					
Methodology of the Canadian Labour Force Survey	1984-1990	71-526	48	58	67
The Labour Force	January 1991	71-001	17.90/179	21.50/215	25.10/251
INDUSTRY					
Department Store Sales and Stocks	April 1990	63-002	14.40/144	17.30/173	20.20/202
Crude Petroleum and Natural Gas Production	October 1990	26-006	10/100	12/120	14/140
Department Store Monthly Sales, Including Concessions, by Province and Metropolitan Area	November 1990	63-004	2.70/27	3.20/32	3.80/38
Electric Lamps (Light Bulbs and Tubes)	January 1991	43-009	5/50	6/60	7/70
Footwear Statistics	December 1990	33-002	5/50	6/60	7/70
Gas Utilities	October 1990	55-002	12.70/127	15.20/152	17.80/178
Industrial Chemicals and Synthetic Resins	December 1990	46-002	5.60/56	6.70/67	7.80/78
Monthly Survey of Manufacturing	December 1990	31-001	17.30/173	20.80/208	24.20/242
New Motor Vehicle Sales	April 1990	63-007	14.40/144	17.30/173	20.20/202
Oils and Fats	December 1990	32-006	5/50	6/60	7/70
Particleboard, Waferboard and Fibreboard	December 1990	36-003	5/50	6/60	7/70
Production and Disposition of Tobacco Products	January 1991	32-022	5/50	6/60	7/70
Production and Shipments of Steel Pipe and Tubing	December 1990	41-011	5/50	6/60	7/70
Pulpwood and Wood Residue Statistics	December 1990	25-001	6.10/61	7.30/73	8.50/85
Shipments of Plastic Film and Bags Manufactured from Resin	Quarter Ended December 31, 1990	47-007	6.75/27	8/32	9.50/38
Specified Domestic Electrical Appliances	December 1990	43-003	5/50	6/60	7/70
Steel Wire and Specified Wire Products	December 1990	41-006	5/50	6/60	7/70
Wholesale Trade	November 1990	63-008	14.40/144	17.30/173	20.20/202
INTERNATIONAL TRADE					
Preliminary Statement of Canadian International Trade	December 1990	65-001P	10/100	12/120	14/140
INVESTMENT AND CAPITAL STOCK					
Building Permits	November 1990	64-001	22.10/221	26.50/265	30.90/309
LABOUR AND HOUSEHOLD SURVEY ANALYSIS					
Canada's Men: A Profile of Their 1987 Labour Market Experience	February 1991	71-206	12	14	17
Canada's Older Workers: A Profile of Their 1987 Labour Market Experience	February 1991	71-208	12	14	17
Canada's Youth: A Profile of Their 1987 Labour Market Experience	February 1991	71-207	12	14	17
Pension Plan Coverage in Canada: A Profile of Participants' 1986 Labour Market Experience	February 1991	71-217	12	14	17
PRICES					
Farm Product Price Index (1986 = 100)	December 1990	62-003	7.10/71	8.50/85	9.90/99
Industry Price Indexes	November 1990	62-011	18.20/182	21.80/218	25.50/255
TRANSPORTATION					
Oil Pipe Line Transport	November 1990	55-001	10/100	12/120	14/140
Passenger Bus and Urban Transit Statistics	July 1990	53-003	7.10/71	8.50/85	9.90/99
Railway Carloadings	December 1990	52-001	8.30/83	10/100	11.60/116

CURRENT TRENDS*

Gross Domestic Product

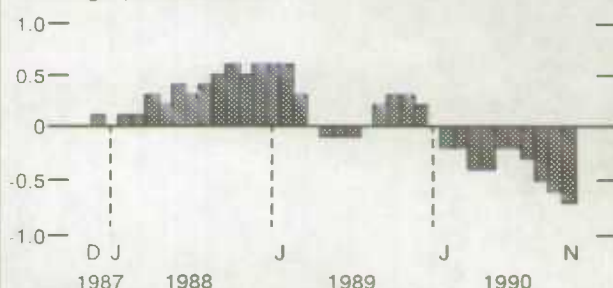
% change, previous month



Gross Domestic Product at factor cost declined by 0.8% in November, the fourth consecutive decline.

Composite Leading Indicator

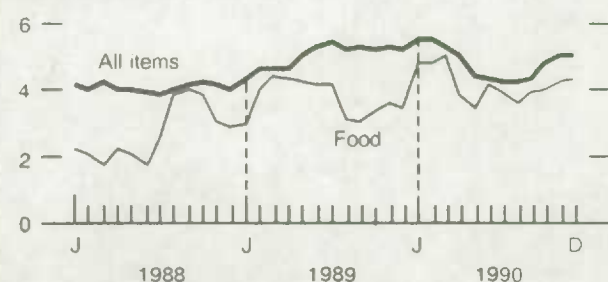
% change, previous month



In November, the Composite Leading Indicator recorded its largest decrease (-0.7%) since it started receding in February 1990.

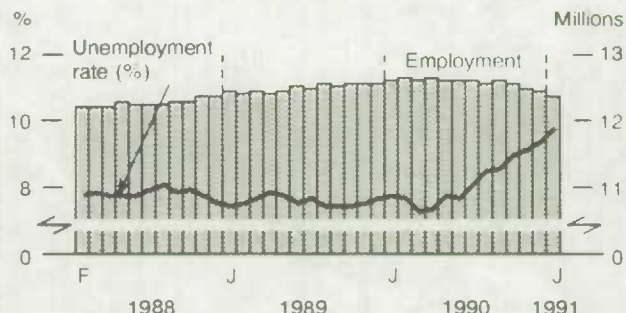
Consumer Price Index

% change, previous year



In December as in November, the Consumer Price Index registered a year-over-year increase of 5.0%.

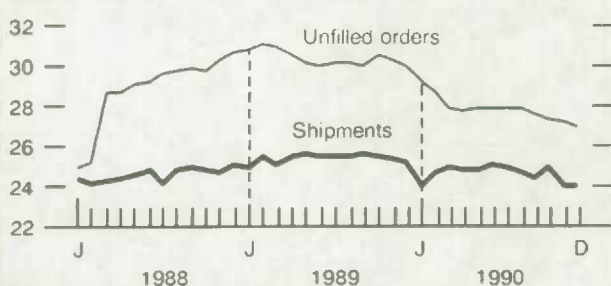
Unemployment Rate and Employment



In January, employment declined by 0.7% (90,000 persons), the sharpest drop since 1982. The unemployment rate rose to 9.7%.

Manufacturing

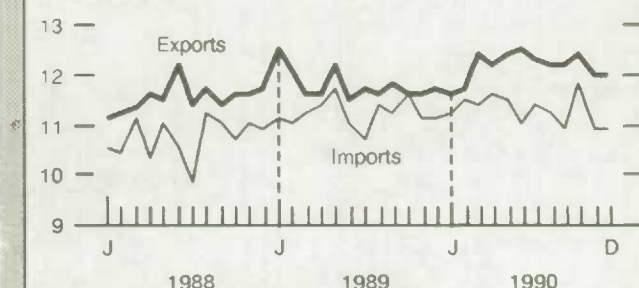
Billions of dollars



Shipments were down 0.3% in December, following a sharp decrease in November. Unfilled orders maintained their downward trend.

Merchandise Trade

Billions of dollars



In the aggregate, the value of exports and imports did not vary greatly from November to December.

*All series are seasonally adjusted except the consumer price index.

LATEST MONTHLY STATISTICS

	Period	Level	Change Previous Period	Change Previous Year
GENERAL				
Gross Domestic Product (\$ billion, 1986)	November	502	-0.8%	-1.9%
Composite Leading Indicator (1981 = 100)	November	140.7	-0.7%	-2.5%
Profits of Industrial Corporations (\$ billion)	3rd Q	5.2	13.6%	-29.5%
DOMESTIC DEMAND				
Retail Trade (\$ billion)	December*	16.2	0.8%	-0.1%
New Motor Vehicle Sales ('000 units)	December	94	-3.5%	-19.2%
LABOUR				
Employment (millions)	January	12.4	-0.7%	-2.0%
Unemployment Rate (%)	January	9.7	0.4	2.0
Participation Rate (%)	January	66.4	-0.3	-0.9
Labour Income (\$ billion)	November	32.2	-0.1%	5.5%
Average Weekly Earnings (\$)	November	523.03	-0.1%	5.6%
INTERNATIONAL TRADE				
Merchandise Exports (\$ billion)	December*	12.0	-0.4%	2.6%
Merchandise Imports (\$ billion)	December*	10.8	0.2%	-2.0%
Merchandise Trade Balance (\$ billion)	December*	1.1	-0.1	0.5
MANUFACTURING				
Shipments (\$ billion)	December*	23.9	-0.3%	-5.1%
New Orders (\$ billion)	December*	23.7	-0.6%	-5.0%
Unfilled Orders (\$ billion)	December*	26.9	-0.8%	-10.2%
Inventory/ Shipments Ratio	December*	1.57	0.01	0.05
Capacity Utilization (%)	3rd Quarter	78.0	-1.1	-5.5
PRICES				
Consumer Price Index (1986 = 100)	December	121.8	-0.1%	5.0%
Industrial Product Price Index (1986 = 100)	December	110.5	-0.2%	1.8%
Raw Materials Price Index (1986 = 100)	December	121.9	-7.2%	15.9%
New Housing Price Index (1986 = 100)	December	136.1	-0.3%	-6.3%

Note: All series are seasonally adjusted with the exception of average weekly earnings and the price indexes.

** New this week.*

I·N·F·O·M·A·T

A Weekly Review

Published by the Communications Division
Statistics Canada.

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R.H. Coats Building, Tunney's Pasture, Ottawa, Ontario K1A 0T6.

Catalogue: 11-002E. Price: Canada: \$2.50 per issue, \$125.00 per year; United States: US\$3.00 per issue, US\$150.00 per year; Other Countries: US\$3.50 per issue, US\$175.00. To subscribe: send money order or cheque payable to the Receiver General for Canada/Publication Sales, Statistics Canada, Ottawa, Ontario K1A 0T6. To order by telephone dial: 1-800-267-6677 within Canada or 613-951-7277 from all other countries.

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