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Major Releases

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Retail Trade, December 1986 and Annual 1986

- Retail sales totalled \$14.4 billion, up 8.5% from December 1985.

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International Travel Account, Fourth Quarter 1986 and Annual 1986

- Canada posted its lowest fourth quarter travel account deficit with the United States since 1975.

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Crude Oil and Natural Gas, November 1986

- Exports of crude oil increased 27.6% from a year earlier while exports of natural gas decreased 8.9%.

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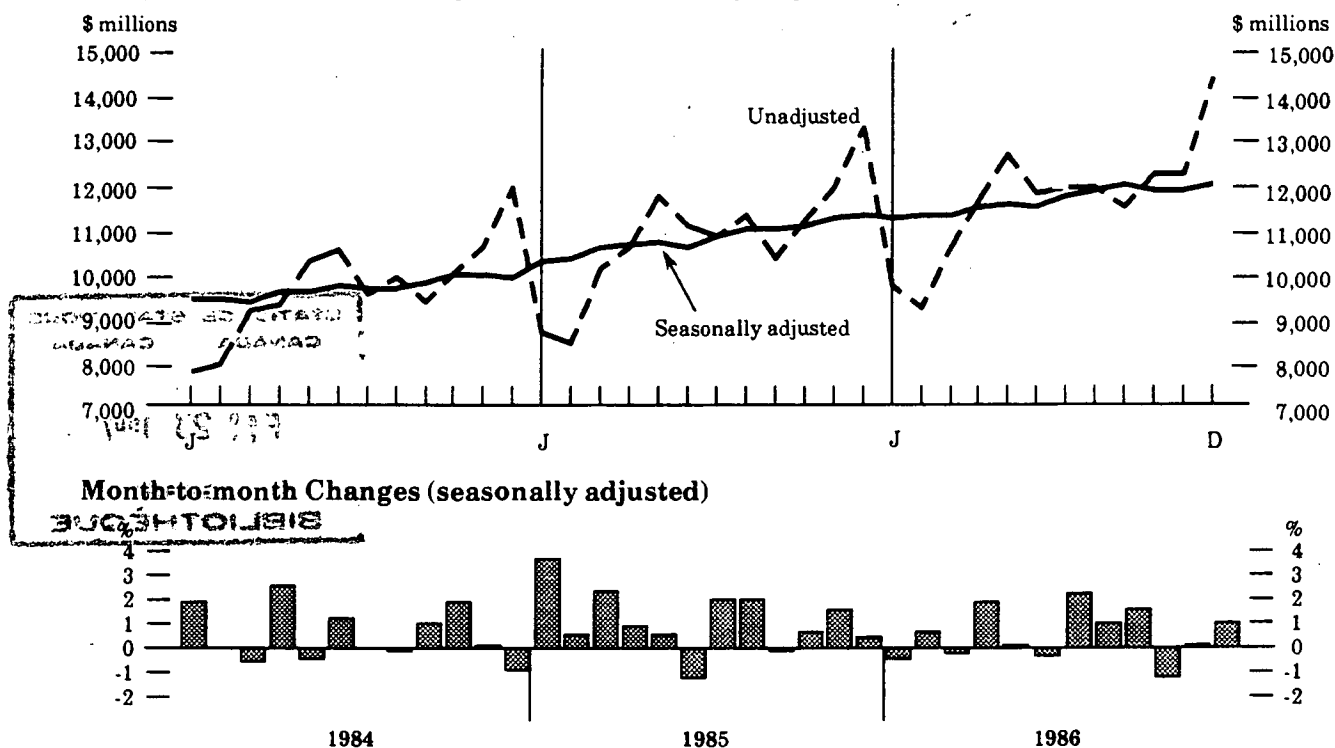
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Major Releases

Monthly Retail Trade, Unadjusted and Seasonally Adjusted, Canada, 1984-1986



Retail Trade

December 1986

Highlights

Seasonally Adjusted Sales

- Adjusted for seasonal fluctuations and the number of trading days, preliminary estimates indicate that retail sales totalled \$11,996 million in December 1986, an increase of 1.0% over the previous month's revised total of \$11,881 million.
- The increase in December triggered a modest growth of 0.5% in retail sales for the fourth quarter following increases of 3.1% in the third quarter and 1.9% in the second quarter.

- The increase in December was primarily attributable to a gain of 5.1% in motor vehicle dealer sales. Partly offsetting the impact of this increase were declines for general merchandise stores (\$14 million or 5.3%), combination stores (\$8 million or 0.4%) and jewellery stores (\$7 million or 7.3%). The increase recorded by motor vehicle dealers in December 1986 followed two consecutive monthly declines. Sales by department stores amounted to \$1,077 million, virtually unchanged from the previous month's revised total.

(continued on page 3)

- Excluding new and used motor vehicle dealers, retail trade actually decreased by 0.1% in December 1986, following an increase of 1.9% in November.
- On a provincial basis, retail sales increases in Quebec (\$28 million or +1.0%), Ontario (\$23 million or +0.5%) and Manitoba (\$8 million or +1.8%) had the largest impact on the increase at the national level. Sales declined in Saskatchewan (-0.9%) and in Alberta (-0.4%).

Note: The revision to the November retail trade seasonally adjusted data was unusually large, totalling \$146 million. This results in a revised increase of 0.2% compared to the preliminary figure of 1.2%. The revision was due to information obtained from late survey responses.

Unadjusted Sales

- Total retail trade for December 1986 rose 8.5% over the same month last year, totalling \$14,426 million.
- Year-over-year comparisons indicated a substantial rise of 10.4% for all food stores and an increase of 7.6% for motor vehicle dealers - the two largest groups within retail trade. Department store sales, which totalled \$1,945 million in December 1986, were up 6.1% over the same month a year earlier. Service station sales declined for the ninth consecutive month on a year-over-year basis to total \$890 million, down 8.7% from the December 1985 level.
- On a provincial basis, most of the year-over-year growth registered in December 1986 was concentrated in Ontario (\$517 million or +9.9%), Quebec (\$311 million or +10.0%) and British Columbia (\$102 million or +6.8%). Newfoundland (+13.9%), Prince Edward Island (+12.9%) and New Brunswick (+10.2%) posted gains that were higher than the national average.
- At the metropolitan level, the following sales gains were recorded: Toronto (+12.6%), Vancouver (+8.1%), Montreal (+7.4%) and Winnipeg (+2.2%).

Annual 1986 (Preliminary Estimates)

- Preliminary estimates indicate that retail sales, unadjusted for price change, advanced 7.8% in 1986 to reach a level of \$139,676 million, down from the 11.5% growth recorded in 1985 and the lowest annual increase since 1982. This decline in growth was primarily due to a sharp deceleration in motor vehicle dealer sales. In 1986, the value of these sales increased 10.2% compared to the average annual increase of 21.8% in the three previous years.
- The growth in 1986 was broadly based as 26 of the 28 trade groups recorded higher sales. The largest increases were reported by used car dealers (+20.0%), grocery, confectionery and sundries stores (+15.2%) and hardware stores (+14.5%). Service station sales were down a moderate 3.7% in 1986, following increases of 14.1% in 1985 and 8.7% in 1984. This downturn was mainly due to the decline in prices for gasoline.
- Independent retailers reported sales of \$82,411 million in 1986, an increase of 9.6% over 1985. Chain store sales amounted to \$57,265 million, up 5.4% over 1985.
- All provinces and territories registered sales increases in 1986 as compared to a year earlier with gains ranging from 9.2% in New Brunswick to 4.5% in Manitoba. Sales were also higher in the four metropolitan areas covered by the survey: 11.8% in Toronto, 8.9% in Vancouver, 8.6% in Montreal and 4.0% in Winnipeg.

(see table on page 4)

Available on CANSIM: matrices 2300-2304, 2306-2313, 2315-2317, 2320 and 2321.

Order the December 1986 issue of *Retail Trade* (63-005, \$14/\$140), available the third week of March. Contact: Lina Di Piéto (613-991-3551) or Maurice Massaad (613-990-9682), Retail Trade Section, Industry Division.

Retail Trade, Canada, by Kind of Business

Kind of Business	Unadjusted Sales All Stores				Seasonally Adjusted Sales All Stores				
	Dec. 1985	Nov. 1986 ^r	Dec. 1986 ^p	Dec. '86/'85	Sept. 1986 ^r	Oct. 1986 ^r	Nov. 1986 ^r	Dec. 1986 ^p	Dec. '86/ Nov. '86
	(millions of \$)				(millions of \$)				
				%					%
Combination stores (groceries and meat)	2,064.0	2,117.6	2,240.2	8.5	2,106.4	2,107.3	2,157.5	2,149.7	-0.4
Grocery, confectionery and sundries stores	546.5	581.3	639.6	17.1	592.1	598.5	611.6	624.6	2.1
All other food stores	235.5	220.0	263.1	11.8	221.0	226.5	228.0	226.5	-0.6
Department stores	1,833.9	1,356.4	1,945.3	6.1	1,041.4	1,065.0	1,076.8	1,077.1	-
General merchandise stores	318.0	352.8	324.9	2.2	244.6	242.5	269.8	255.5	-5.3
General stores	195.2	172.0	210.8	8.0	173.2	174.1	179.2	181.1	1.1
Variety stores	196.0	116.2	192.0	-2.0	100.3	101.4	102.4	104.2	1.8
Motor vehicle dealers	1,867.9	2,163.8	2,011.5	7.6	2,642.8	2,490.8	2,333.7	2,452.4	5.1
Used car dealers	39.6	61.9	56.4	42.2	70.0	72.2	66.9	73.9	10.4
Service stations	974.9	860.0	890.0	-8.7	868.2	867.1	862.5	862.9	0.1
Garages	115.5	130.9	119.6	3.6	135.5	130.5	128.4	127.7	-0.5
Automotive parts and accessories stores	304.8	321.5	361.8	18.7	266.5	257.7	278.4	280.5	0.8
Men's clothing stores	201.4	165.2	223.7	11.1	122.2	121.4	124.2	122.4	-1.5
Women's clothing stores	347.3	288.2	396.6	14.2	262.7	263.2	266.2	268.7	0.9
Family clothing stores	263.8	196.8	293.3	11.1	177.4	176.1	176.4	178.8	1.4
Specialty shoe stores	19.6	24.9	25.7	31.3	20.7	20.0	21.9	22.8	3.9
Family shoe stores	124.7	134.7	132.8	6.4	98.4	96.3	102.3	97.9	-4.3
Hardware stores	125.2	114.4	138.8	10.9	113.3	116.0	116.0	111.6	-3.8
Household furniture stores	150.0	162.5	169.7	13.1	151.0	154.9	150.2	151.2	0.7
Household appliance stores	57.4	53.1	62.8	9.5	49.3	47.8	49.4	50.1	1.5
Furniture, TV, radio and appliance stores	122.2	119.6	150.7	23.3	113.0	112.5	114.9	119.0	3.6
Pharmacies, patent medicine and cos- metics stores	604.6	515.3	680.4	12.5	513.3	513.9	523.7	529.7	1.1
Book and stationery stores	119.1	76.3	135.0	13.4	64.9	67.3	68.7	69.3	0.9
Florists	60.2	36.5	65.4	8.6	44.8	45.0	44.5	43.9	-1.5
Jewellery stores	226.8	106.5	245.2	8.2	89.6	91.4	92.9	86.1	-7.3
Sporting goods and accessories stores	184.7	150.8	220.2	19.2	178.3	171.4	189.5	190.6	0.6
Personal accessories stores	252.4	177.3	284.0	12.5	175.2	171.5	170.3	171.7	0.8
All other stores	1,749.1	1,442.4	1,946.8	11.3	1,377.3	1,360.3	1,375.0	1,366.4	-0.6
All stores - Total	13,300.3	12,218.9	14,426.4	8.5	12,013.5	11,862.6	11,881.0	11,996.2	1.0

^p Preliminary.

^r Revised.

International Travel Account

Fourth Quarter 1986

In the fourth quarter of 1986, preliminary estimates show that Canada registered its lowest fourth-quarter deficit (-\$473 million) since 1982. The improvement on the travel account deficit was due to a decline in the deficit with the United States, which recorded its lowest fourth-quarter level since 1975.

The travel account deficit with countries other than the United States remained high, at about the same level registered in the fourth quarter of 1985.

Total receipts from international travel increased by 16% over the fourth quarter of 1985 - a lower rate than the ones experienced in the previous quarters of 1986. It should be noted that Expo 86 played a major role in the results of the second and third quarters of the year.

Payments by Canadian residents travelling abroad advanced by 7.5%, reaching the highest level in a fourth quarter.

Annual 1986

Preliminary estimates for 1986 show that Canada's deficit on the travel account was \$1,083 million, the lowest level since 1979. Canada earned 27% more from international travel than in 1985. Payments by Canadians travelling abroad increased by only 4.9%, the smallest increase since 1982.

Note: Revisions to the third quarter 1986 estimates are included in the accompanying table.

Order the October-December issue of *Travel Between Canada and Other Countries* (66-001, \$35/\$140), available at the end of March. Contact: Paul L. Paradis (613-990-8933), International Travel Section, International and Financial Economics Division.

Receipts and Payments of International Travel

	1985					1986 ^P				
	QI	QII	QIII	QIV	1985	QI	QII	QIII	QIV	1986
(millions of \$)										
United States										
Receipts	370	876	1,795	633	3,674	457	1,109	2,277	708	4,551
Payments	1,230	1,091	1,055	782	4,158	1,303	1,196	1,095	825	4,419
Balance	-860	-215	740	-149	-484	-846	-87	1,182	-117	132
All other countries										
Receipts	148	380	576	228	1,332	194	519	825	288	1,826
Payments	728	714	925	585	2,952	834	699	864	644	3,041
Balance	-580	-334	-349	-357	-1,620	-640	-180	-39	-356	-1,215
Total all countries										
Receipts	518	1,256	2,371	861	5,006	651	1,628	3,102	996	6,377
Payments	1,958	1,805	1,980	1,367	7,110	2,137	1,895	1,959	1,469	7,460
Balance	-1,440	-549	391	-506	-2,104	-1,486	-267	1,143	-473	-1,083

^P Preliminary estimates.

Crude Oil and Natural Gas

November 1986

Highlights

- Preliminary figures indicate that production of crude oil and equivalent hydrocarbons in Canada in November amounted to 7 394.9 thousand cubic metres, a 5.9% decrease from November 1985. On a cumulative basis, production stood at 83 382.4 thousand cubic metres, up 0.3% from the January-November 1985 period.
- Crude oil exports for the January-November period reached 31 120.9 thousand cubic metres, an increase of 21.5% over the same period in 1985, while imports rose by 26.3% to reach 18 479.9 thousand cubic metres. (It should be noted that exports are primarily through pipeline systems, while imports are primarily

by boat, a single arrival of which can materially influence the import data.)

- Marketable production of natural gas declined by 4.6% from November 1985, while year-to-date production was off 6.9%. Sales in Canada decreased 5.6% for the current month and the year-to-date period showed a drop of 3.6% from last year's levels. Export deliveries, however, were down 8.9% for the month and 19.8% for the January-November period.

Available on CANSIM: matrices 127 and 128.

Order the November 1986 issue of *Crude Petroleum and Natural Gas Production* (26-006, \$8/\$80), to be released the second week of March. Contact: G. O'Connor (613-991-3562), Industry Division.

Crude Oil and Natural Gas

	Nov. 1986	% Change from Nov. 1985	Jan.-Nov. 1986	% Change from Jan.-Nov. 1985
(thousands of cubic metres)				
Crude oil and equivalent				
Production	7 394.9	-5.9	83 382.4	0.3
Exports	2 997.9	27.6	31 120.9	21.5
Imports	1 265.6	-24.3	18 479.9	26.3
Refinery receipts	5 993.9	-15.8	71 506.2	-1.4
(millions of cubic metres)				
Natural gas				
Marketable production	7 038.4	-4.6	64 064.6	-6.9
Exports	1 993.2	-8.9	18 579.0	-19.8
Canadian sales	4 661.2	-5.6	42 723.2	-3.6

Data Availability Announcements

Steel Pipe, Tubing and Fittings

December 1986

Steel pipe and tubing production for December 1986 totalled 78 420 tonnes, a decrease of 17.3% from the 94 823^r tonnes produced a year earlier.

Year-to-date production totalled 1 181 660 tonnes, down 18.6% from the 1 451 446^r tonnes produced during the same period in 1985.

Available on CANSIM: matrix 35.

Order the December 1986 issue of *Steel Pipe, Tubing and Fittings* (41-011, \$4/\$40), to be released the week of March 2. Contact: Gerry Barrett (613-991-3515), Industry Division.

Stocks of Frozen Meat

February 2, 1987

Total frozen meat in cold storage at the opening of the first business day of February totalled 28 165 tonnes, down from 29 790 tonnes in January and 37 477 tonnes a year earlier.

Available on CANSIM: matrices 87 and 9517-9525.

Order the February issue of *Stocks of Frozen Meat Products* (32-012, \$10/\$100), scheduled for release March 9. Contact: P.L. Beerstecher (613-990-8714), Agriculture/Natural Resources Division.

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