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Major Releases

Retail Trade, December 1988 and Annual Review

- Seasonally adjusted, retail sales totalled \$14.3 billion in December, an increase of 1.9% over November 1988.

Farm Cash Receipts, January-December 1988

- Farm cash receipts in 1988 rose 4% from the 1987 level.

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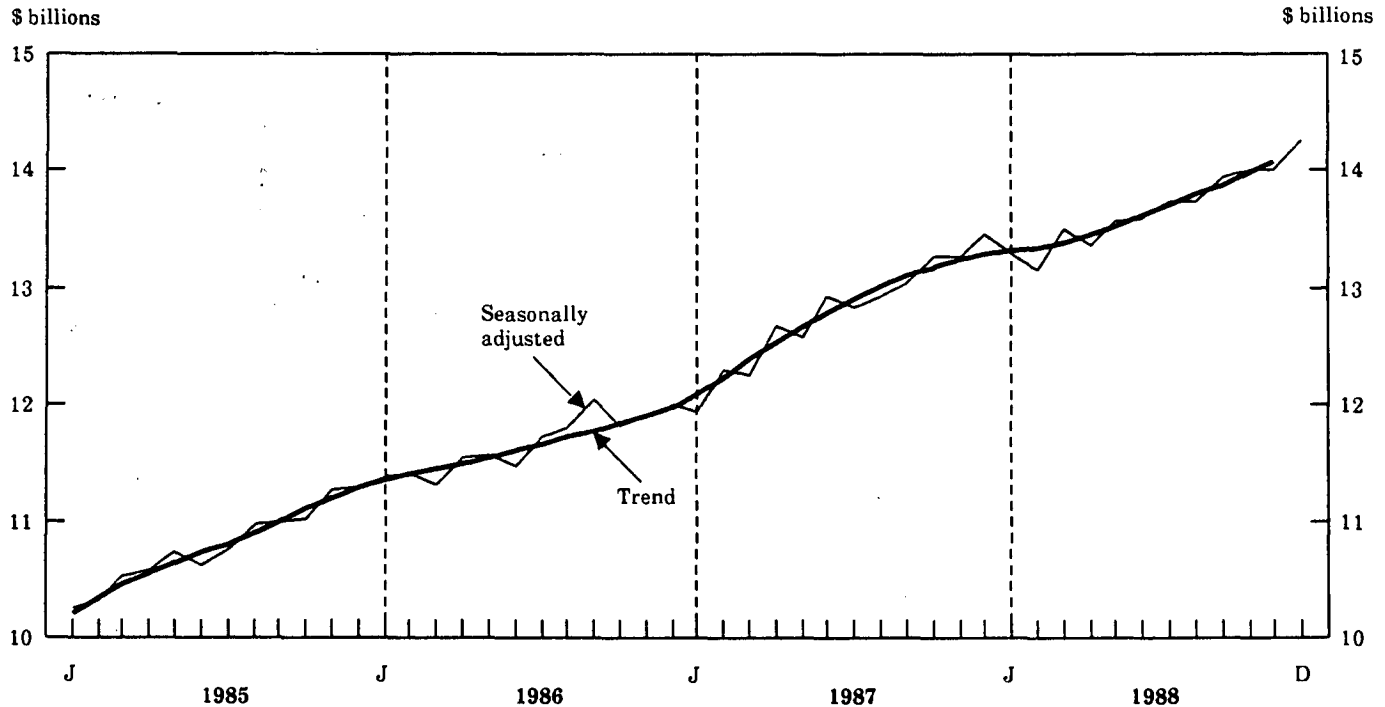
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Major Releases

Monthly Retail Trade Sales, Seasonally Adjusted, Canada, 1985-1988



Retail Trade

December 1988

Highlights

Seasonally Adjusted Sales

- Adjusted for seasonal fluctuations and the number of trading days, preliminary estimates indicate that retail sales totalled \$14.3 billion in December 1988, an increase of 1.9% over the previous month's revised total. Excluding new and used motor vehicle dealers, retail trade increased 1.2% in December.
- The 1.9% increase in December followed no growth in November and a moderate increase of 0.4% in October. Retail sales advanced by 2.1% in the last quarter of 1988 compared to an average increase of 1.1% in the first three quarters of the year.

- In December, the most significant sales increases, in order of dollar impact, were reported by motor vehicle dealers (+4.3%), automotive parts and accessories stores (+9.0%) and combination stores (+1.2%). Partially offsetting these increases were declines by grocery, confectionery and sundries stores (-3.5%) and general stores (-4.5%).

Unadjusted Sales

- Retail trade totalled \$17.7 billion in December 1988, an increase of 8.8% over the same month last year.
- The two largest major groups within retail trade recorded increases over December 1987: total food stores increased by 9.6% while new and used motor vehicle dealers rose 8.0%. Department

(continued on next page)

store sales were up 7.5% on a year-over-year basis, while service station sales increased 2.2% following three consecutive monthly declines.

- All provinces and territories reported higher sales in December 1988 compared to the corresponding month in 1987. Sales were also higher in the four metropolitan areas covered by the survey.

Annual 1988 (Preliminary Estimates)

- Preliminary estimates indicate that retail sales advanced 7.4% in 1988 to reach a level of \$165.1 billion. This was, however down from the 9.8% growth recorded in 1987 and the 8.2% increase registered in 1986. Excluding new and used motor vehicle dealers, retail trade increased 6.3% in 1988 compared to 9.0% in 1987.
- The growth in 1988 was broadly based as 27 of the 28 trade groups recorded higher sales. The most significant increases, in order of dollar impact, were reported by motor vehicle dealers (+11.5%), all food stores (+5.1%) and pharmacies, patent medicine and cosmetic stores (+11.4%).
- Independent retailers reported sales of \$100.2 billion in 1988, an increase of 9.2% over 1987, whereas chain stores sales amounted to \$64.9 billion, up 4.6% over 1987.

Note to users:

The short-term trend provides a clearer picture of the direction and rate of change in retail trade sales. It is calculated by the X-11 ARIMA seasonal adjustment program. Essentially, the calculation involves a 13-term Henderson moving average which smooths irregular fluctuations in the seasonally adjusted data. The trend for the last month is however not shown in the chart since it frequently changes significantly with the addition of succeeding months of data.

- All provinces and territories registered sales increases over 1987. Sales were also higher in the four metropolitan areas covered by the survey.

(see table on next page)

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

The December 1988 issue of *Retail Trade* (63-005, \$16/\$160) will be available the third week of April. See "How to Order Publications".

For more detailed information on this release, contact Roger Laplante (613-951-3552) or Maurice Massaad (613-951-9682), Retail Trade Section, Industry Division.

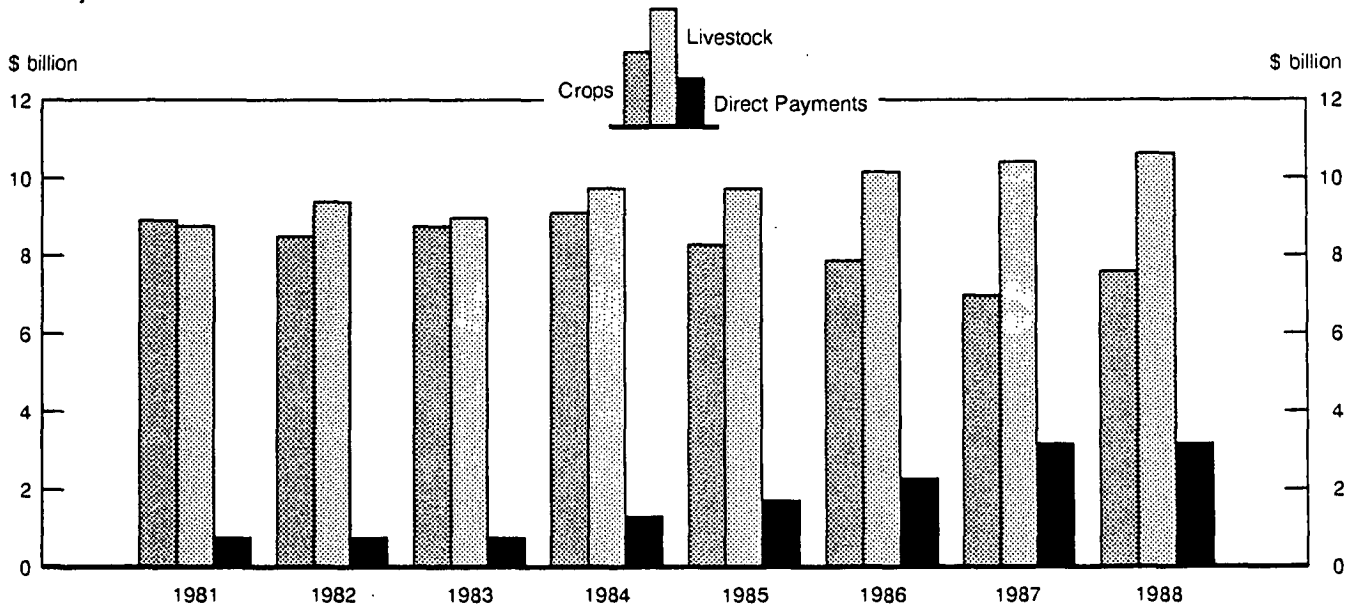
Retail Trade, Canada, by Kind of Business

Kind of Business	Unadjusted Sales All Stores				Seasonally Adjusted Sales All Stores				
	Dec. 1987	Nov. 1988 ^r	Dec. 1988 ^p	Dec. 1988/ Dec. 1987	Sept. 1988 ^r	Oct. 1988 ^r	Nov. 1988 ^r	Dec. 1988 ^p	Dec. 1988/ Nov. 1988
	(millions of \$)			%	(millions of \$)				%
Combination stores (groceries and meat)	2,514.6	2,246.2	2,777.1	10.8	2,326.1	2,378.3	2,329.3	2,356.9	1.2
Grocery, confectionery and sundries stores	693.9	684.0	737.2	5.2	698.7	703.4	721.9	696.8	-3.5
All other food stores	297.9	246.5	327.3	9.9	253.7	255.3	257.5	260.7	1.2
Department stores	2,031.5	1,444.5	2,184.8	7.5	1,116.5	1,121.8	1,117.6	1,139.1	1.9
General merchandise stores	369.1	362.7	356.9	-3.9	260.5	263.8	261.7	266.6	1.9
General stores	226.0	207.3	239.1	5.6	204.7	212.0	208.6	199.2	-4.5
Variety stores	159.5	106.0	163.1	2.3	86.3	87.1	90.5	85.0	-6.0
Motor vehicle dealers	2,416.4	2,966.5	2,603.9	7.8	3,088.2	3,009.9	3,093.5	3,227.0	4.3
Used car dealers	71.4	100.8	82.2	14.3	105.1	105.2	108.6	108.3	-0.3
Service stations	1,056.8	1,034.6	1,068.6	2.2	1,052.4	1,055.8	1,052.6	1,074.0	2.0
Garages	148.7	168.3	149.7	0.7	158.5	158.2	158.2	158.5	0.2
Automotive parts and accessories stores	384.9	364.2	447.5	15.9	322.4	335.0	307.7	335.4	9.0
Men's clothing stores	262.9	185.3	297.1	13.2	147.1	146.8	142.8	149.5	4.7
Women's clothing stores	417.7	305.9	450.9	5.3	281.6	287.7	281.6	290.1	3.0
Family clothing stores	330.9	228.1	372.3	12.8	201.6	209.0	203.2	208.9	2.8
Specialty shoe stores	30.9	26.7	33.8	9.3	26.7	27.6	24.1	28.7	19.4
Family shoe stores	138.3	121.8	159.0	15.0	108.3	111.9	97.0	110.7	14.2
Hardware stores	169.0	164.1	194.2	14.7	152.2	154.2	158.4	156.9	-0.9
Household furniture stores	190.0	193.3	214.4	12.8	170.3	165.3	179.4	182.1	1.5
Household appliance stores	69.4	65.1	73.8	6.6	58.0	58.1	59.1	57.7	-2.3
Furniture, TV, radio and appliance stores	169.9	156.5	175.6	3.7	145.4	142.8	143.1	142.3	-0.6
Pharmacies, patent medi- cine and cosmetics stores	744.2	642.2	842.8	13.0	635.0	637.1	646.6	651.7	0.8
Book and stationery stores	162.3	97.4	186.9	15.0	86.2	86.0	86.8	90.4	4.2
Florists	73.5	48.0	84.0	14.7	53.7	53.5	57.2	55.5	-2.8
Jewellery stores	270.5	113.7	300.9	11.3	102.1	103.5	102.3	103.8	1.5
Sporting goods and accessories stores	277.4	187.8	315.4	14.2	228.8	231.4	228.2	235.0	3.0
Personal accessories stores	365.4	248.7	405.9	11.1	216.4	220.6	234.1	229.4	-2.0
All other stores	2,226.8	1,737.1	2,461.4	10.5	1,655.7	1,679.5	1,655.6	1,668.7	0.8
All stores - Total	16,269.8	14,453.5	17,705.6	8.8	13,942.2	14,000.7	14,006.9	14,268.9	1.9

^p Preliminary figures.

^r Revised figures.

Farm Cash Receipts, Canada 1981-1988 January-December



Note: Western grain stabilization and crop insurance payments have been deducted from crop receipts and added to direct payments.

Farm Cash Receipts January-December 1988

Farm cash receipts for 1988 were \$21.6 billion, up 4% from the revised 1987 level of \$20.8 billion. Higher crop receipts combined with improved receipts for livestock and livestock products were responsible for the increase. Farm cash receipts have now increased for the third consecutive year.

Highlights

Crops

Crops receipts, excluding any direct program payments, rose 9% to \$7.6 billion. But despite this increase, crop receipts were at their second lowest level since 1981. Drought in the Prairies, Ontario and the mid-western United States affected grain and oilseed production, and as a result prices for grains and oilseeds have increased. Rising world export prices enabled the Canadian Wheat Board to increase initial prices and make adjustment payments of \$283 million to producers for grain delivered prior to the increases.

- Oilseed receipts increased 33% from the same period in 1987 due to higher prices. Drought in Ontario and the mid-western United States contributed to reduced soybean production and sharply higher oilseed prices. Prices began to rise in April, peaked in July, and resulted in an average annual price 46% higher than that for the previous year.
- Wheat receipts were slightly above last year's level despite a 19% drop in quantities marketed, as the average annual price rose by 25%. Wheat production in Western Canada dropped by 43% because of drought conditions in 1988.
- Canadian Wheat Board payments reached \$391 million in 1988 compared to \$52 million for the previous year. Most of the increase was attributed to adjustment payments on both the 1987-88 and the 1988-89 crops, reflecting higher export prices.

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Livestock and Animal Products

Livestock and animal product receipts increased slightly to reach a record level of \$10.6 billion. A sharp drop in hog receipts was more than offset by higher receipts for other livestock items.

- Hog receipts declined 16% to \$1.8 billion as a 22% drop in prices more than offset higher marketings. Hog prices have been trending down since October 1987 in response to higher slaughter levels in both Canada and the United States. Hog marketings in Canada increased 8% and were at record levels.
- Dairy product receipts rose 6% to \$3.1 billion. Higher prices and marketings for both fluid and industrial milk were responsible for the increase. A refund of levies on industrial milk, due to lower than anticipated marketing costs of skim milk powder, also contributed to the increase.
- Cattle and calf receipts increased 6% to \$4.0 billion on the strength of higher marketings.

Direct Program Payments

Direct program payments were unchanged at \$3.2 billion in 1988. A \$703 million decline in Western Grain Stabilization Payments was offset by higher payments under the Crop Insurance Act, the Agricultural Stabilization Act and provincial stabilization programs.

- Payments made under the Western Grain Stabilization Act totalled \$693 million, a 50% drop from the previous year's level. The decline was due to the fact that a lower payment was triggered under the Act and that some of this payment was in 1989.
- Crop insurance payments rose 58% to \$581 million, just shy of the 1985 record level, reflecting the poor growing conditions in the summer of 1988. Over half of the payments were made to producers in Saskatchewan where the effects of the drought were most severe.

User Notes

Farm cash receipts measure the gross returns to farmers in current dollars from the sale of all agricultural products except those associated with direct sales between farms in the same province. They also include Canadian Wheat Board and Ontario Wheat Producers' Marketing Board payments, cash advances paid on farm-stored commodities, deferred grain receipts and direct payments to farmers from various federal, provincial and municipal programs.

Realized net farm income, which takes into account producers' operating expenses and depreciation charges, is published in *Agriculture Economic Statistics* (21-603).

- Agriculture Stabilization Act payments reached \$286 million on the strength of payments made on various tripartite plans: corn, potatoes and wheat.
- Payments made under provincial stabilization programs rose to \$236 million from \$72 million in 1987.

(see table on next page)

Available on CANSIM: matrices 3417 to 3427.

Order the January-December 1988 issue of *Farm Cash Receipts* (21-001, \$10/\$40), scheduled for release March 1, 1989. This publication is also available immediately on ENVOY 100, an electronic messaging system. Contact Jacqueline Leblanc-Cooke or Gail-ann Breese (613-951-8706), Agriculture Division.

Total Cash Receipts from Farming Operations
January-December

	1987	1988	% change 1988/1987
	(Millions of Dollars)		
Newfoundland	52.7	54.3	3.0
Prince Edward Island	214.0	210.3	-1.7
Nova Scotia	293.4	298.0	1.6
New Brunswick	247.1	254.4	3.0
Quebec	3,217.6	3,385.9	5.2
Ontario	5,472.4	5,668.9	3.6
Manitoba	2,073.7	1,995.4	-3.8
Saskatchewan	4,242.6	4,243.1	0.0
Alberta	3,968.9	4,431.2	11.7
British Columbia	1,065.7	1,098.8	3.1
Canada	20,848.1	21,640.2	3.8

Note: Totals may not add due to rounding.

Data Availability Announcements

Railway Carloadings

Seven-day Period Ending February 7, 1989

Highlights

- Revenue freight loaded by railways in Canada during the week totalled 3.7 million tonnes, a decrease of 20.9% from the previous year.
- Piggyback traffic decreased 0.2% from the same period last year. The number of cars loaded decreased 0.2%.
- The tonnage of revenue freight loaded to date this year is 6.8% lower than that loaded in the previous year.

Tea, Coffee and Cocoa

Fourth Quarter 1988

Data on tea, coffee and cocoa for the fourth quarter of 1988 are now available.

The publication *Production and Stocks of Tea, Coffee and Cocoa* (32-025,\$6.25/\$25) will be released at a later date. See "How to Order Publications".

Available on CANSIM: matrix 188 (series 1.7 and 1.8).

For further detailed information on this release, contact Brian Preston (613-951-3511), Industry Division.

	Seven-day Period Ending February 7, 1989	Year-to-date
Carload Traffic		
Tonnes	3 723 338	22 768 045
% change from previous year	-20.9	-6.8
Cars	57,242	336,337
% change from previous year	-16.3	-4.9
Piggyback Traffic		
Tonnes	243 839	1 305 942
% change from previous year	-0.2	1.5
Cars	8,510	44,629
% change from previous year	-0.2	2.2

Note: Piggyback traffic includes trailers and containers on flat cars. Piggyback traffic numbers are included in total carload traffic.

For more detailed information on this release, contact Angus MacLean (613-951-2484), Surface Transport Unit, Transportation Division.

Publications Released

Fruit and Vegetable Production, December 1988.
Catalogue number 22-003
(Canada: \$16.50/\$66; Other Countries: \$17.50/\$70).

Particleboard, Waferboard and Hardboard,
December 1988.
Catalogue number 36-003
(Canada: \$4.50/\$45; Other Countries: \$5.50/\$55).

Aviation Statistics Service Bulletin, November
1988.
Catalogue number 51-004
(Canada: \$8.50/\$85; Other Countries: \$9.50/\$95).

Vending Machine Operators, Fiscal Year ended
March 31, 1988.
Catalogue number 63-213
(Canada: \$20; Other Countries: \$21).

Federal Government Finance, 1986-87.
Catalogue number 68-211
(Canada: \$25; Other Countries: \$26).

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