

# The Daily

Statistics Canada

Friday, May 25, 1990

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## MAJOR RELEASES

- **Retail Trade, March 1990** 2  
Seasonally adjusted retail sales totalled \$16.5 billion in March 1990, an increase of 0.4% over February.
- **Building Permits, March 1990** 4  
The preliminary value of building permits issued in Canada decreased (-2.2%) for the second consecutive month, to \$3,216.0 million in March.
- **Security Transactions with Non-residents, March 1990** 6  
Non-residents purchased, on a net basis, \$641 million of Canadian bonds, up from February 1990, but well below the strong monthly investments of the previous six months.
- **International Travel Account, First Quarter 1990** 8  
Unadjusted for seasonal variation, Canada's travel account deficit was estimated at a record level of \$2.4 billion during the first quarter of 1990.

## DATA AVAILABILITY ANNOUNCEMENTS

Air Carrier Fare Basis Statistics, January-June 1989	10
Canadian Civil Aviation Statistics, March 1990	10
Steel Primary Forms (Steel Ingots), Week Ending May 19, 1990	10
Electric Lamps, April 1990	10
Shipments of Office Furniture Products, First Quarter 1990	11
Vegetable Oil Mills (Except Corn Oil) Industry, 1988 Annual Survey of Manufactures	11

## PUBLICATIONS RELEASED 12

## MAJOR RELEASE DATES: Week of May 28 to June 1 13



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## MAJOR RELEASES

### Retail Trade

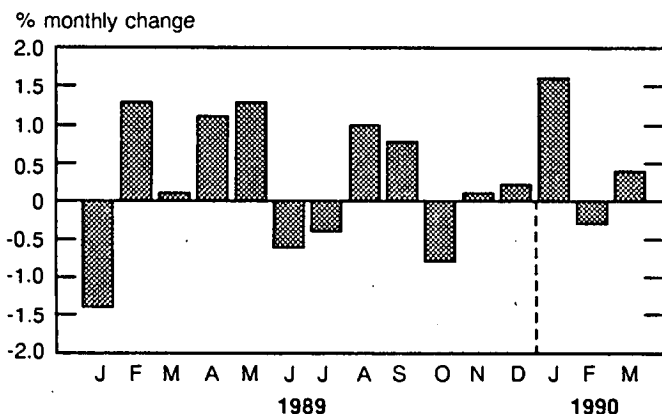
March 1990

#### Highlights

##### Seasonally Adjusted

- Preliminary estimates indicate that retail sales increased 0.4% in March 1990, to \$16.5 billion. Excluding recreational and motor vehicle dealers, retail trade decreased 0.4% in March 1990, following a 0.7% gain in February 1990.
- The 0.4% increase in March followed a 0.3% decline in February and a 1.6% gain in January 1990. Due principally to the strong increase in January, retail sales advanced 1.7% in the first quarter of 1990, compared to a modest growth of 0.2% in the last quarter of 1989.

#### Retail Sales, Canada, Seasonally Adjusted



- The overall gain in March was primarily attributable, in order of dollar impact, to increases reported by recreational and motor vehicle dealers (+3.4%), other clothing stores (+5.1%) and gasoline service stations (+1.3%). Partly offsetting these increases were declines by supermarkets and grocery stores (-1.6%), general merchandise stores (-0.6%) and

#### Note to Users:

Data users should note that seasonally adjusted estimates of retail trade for the period January 1989 to February 1990 have been revised to incorporate the latest unadjusted data and updated trading day adjustment factors. Unadjusted retail sales estimates have been revised, where necessary, to incorporate additional information and late responses.

automotive parts, accessories and services stores (-0.9%).

- The 3.4% gain in sales reported by recreational and motor vehicle dealers followed a 3.6% decline in February 1990. The 1.3% increase by gasoline service stations constitutes the second consecutive monthly gain. The 0.6% decline in sales of general merchandise stores followed three consecutive monthly increases.
- Provincial growth rates varied considerably, with notable gains recorded in British Columbia (2.4%), Ontario (1.6%) and New Brunswick (1.3%). The Yukon and Northwest Territories recorded an increase of 4.4%.

#### Year-to-date

- Cumulative retail sales for the first quarter of 1990 amounted to \$43.1 billion, up 6.4% over the corresponding period in 1989.

Available on CANSIM: matrices 2398 (department store-type merchandise totals for the provinces and territories), 2399 (seasonally adjusted) and 2400 (not seasonally adjusted).

The March 1990 issue of *Retail Trade* (63-005, \$14.40/\$144) will be available the first week of June. See "How to Order Publications".

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



**Retail Sales, by Trade Group and by Region**

March 1990.

Trade group	Unadjusted				Seasonally Adjusted											
	Mar. 1989	Feb. 1990 <sup>r</sup>	Mar. 1990 <sup>p</sup>	Mar. 1990/ 1989	Mar. 1989 <sup>r</sup>	Dec. 1989 <sup>r</sup>	Jan. 1990 <sup>r</sup>	Feb. 1990 <sup>r</sup>	Mar. 1990 <sup>p</sup>	Mar. 1990/ Feb. 1990	Mar. 1990/ 1989					
	millions of \$				%				millions of \$				%		%	
<b>Canada</b>																
Supermarkets and grocery stores	3,437	3,124	3,609	5.0	3,394	3,451	3,476	3,492	3,437	-1.6	1.2					
All other food stores	280	256	288	3.0	289	299	298	299	294	-1.8	1.7					
Drug and patent medicine stores	699	693	758	8.4	706	744	761	760	767	0.9	8.7					
Shoe stores	115	104	148	28.1	146	166	172	174	172	-1.1	18.3					
Men's clothing stores	146	113	151	3.4	185	186	184	187	182	-3.1	-1.7					
Women's clothing stores	275	232	331	20.2	304	340	346	346	353	1.8	16.1					
Other clothing stores	326	243	352	8.0	370	377	373	366	385	5.1	3.9					
Household furniture and appliance stores	716	621	725	1.2	781	773	798	779	782	0.3	0.1					
Household furnishings stores	179	164	197	10.4	198	193	214	209	217	3.8	9.7					
Recreational and motor vehicle dealers	3,998	2,928	4,213	5.4	3,676	3,671	3,794	3,659	3,784	3.4	3.0					
Gasoline service stations	1,059	1,039	1,169	10.4	1,099	1,212	1,192	1,203	1,219	1.3	10.9					
Automotive parts, accessories and services	839	794	944	12.6	917	981	1,031	1,051	1,042	-0.9	13.6					
General merchandise stores	1,470	1,208	1,536	4.5	1,687	1,727	1,737	1,746	1,735	-0.6	2.8					
Other semi-durable goods stores	487	490	546	12.2	593	638	636	657	660	0.4	11.2					
Other durable goods stores	376	356	392	4.4	466	500	461	484	481	-0.7	3.1					
All other retail stores	875	759	912	4.2	1,000	985	1,024	1,037	1,017	-1.9	1.7					
<b>Total, all stores</b>	<b>15,276</b>	<b>13,124</b>	<b>16,271</b>	<b>6.5</b>	<b>15,810</b>	<b>16,244</b>	<b>16,499</b>	<b>16,452</b>	<b>16,525</b>	<b>0.4</b>	<b>4.5</b>					
Total excluding rec. and motor vehicle dealers	11,278	10,196	12,058	6.9	12,134	12,573	12,705	12,793	12,741	-0.4	5.0					
Department store type merchandise	4,788	4,225	5,135	7.3	5,435	5,645	5,684	5,711	5,732	0.4	5.5					
<b>Regions</b>																
Newfoundland	276	240	292	5.7	287	300	300	305	303	-0.8	5.6					
Prince Edward Island	60	50	61	2.6	66	68	67	68	68	0.0	2.6					
Nova Scotia	491	438	530	7.9	513	540	542	552	551	-0.3	7.3					
New Brunswick	378	324	399	5.7	395	404	409	412	417	1.3	5.6					
Quebec	3,905	3,213	4,047	3.6	3,966	4,030	4,078	4,081	4,076	-0.1	2.8					
Ontario	5,729	4,862	6,065	5.9	6,019	6,081	6,156	6,086	6,184	1.6	2.7					
Manitoba	525	474	560	6.6	551	582	585	592	590	-0.4	7.0					
Saskatchewan	499	418	501	0.4	526	512	539	515	518	0.6	-1.5					
Alberta	1,551	1,355	1,635	5.4	1,577	1,628	1,675	1,646	1,653	0.4	4.8					
British Columbia	1,824	1,715	2,137	17.2	1,863	2,057	2,095	2,103	2,153	2.4	15.6					
Yukon and Northwest Territories	39	36	43	11.9	42	45	47	45	47	4.4	11.8					
Yukon	15	13	17	12.0	..	..	..	..	..	..	..					
Northwest Territories	23	23	26	11.9	..	..	..	..	..	..	..					



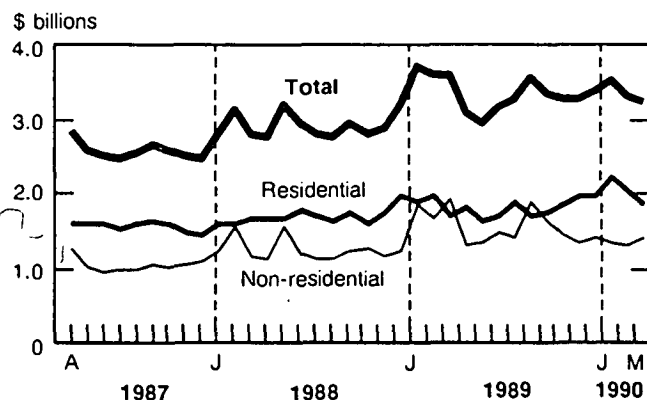
## Building Permits

March 1990

The preliminary value of building permits issued in Canada decreased (-2.2%), for the second consecutive month, to \$3,216.0 million in March from \$3,286.7 million in February. This slight drop was entirely attributable to the residential sector.

### Value of Building Permits Issued in Canada

Seasonally adjusted



Note: Revised data for February, preliminary data for March.

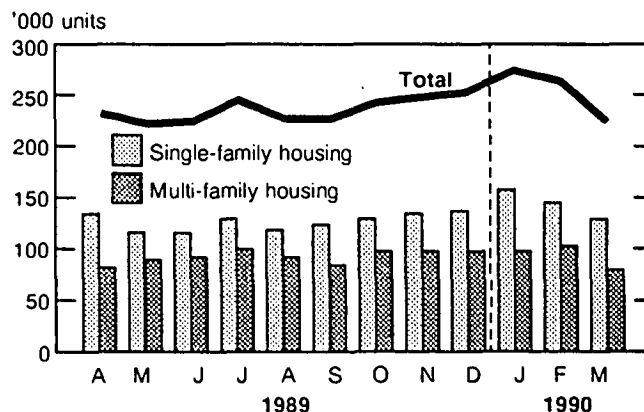
### Residential Sector

- The preliminary value of residential building permits was down 8.5% to \$1,839.4 million in March, from \$2,010.1 million in February.
- This drop was attributable to both the single-family dwelling sector, which decreased 8.5% to \$1,321.1 million and the multi-family dwelling sector, which also decreased 8.5% to \$518.3 million.
- The Atlantic region was the only region to register a gain in the value of residential building permits in March.

- The number of dwelling units authorized in March fell 16.2% to 207,708 units at an annual rate (127,860 single-detached and 79,848 multiple dwellings), from the February level of 247,740 units.

### Dwelling Units Authorized in Canada

Seasonally adjusted at annual rates



Note: Revised data for February, preliminary data for March.

### Non-residential Sector

- The preliminary value of non-residential building permits was \$1,376.6 million in March, up 7.8% over \$1,276.6 million in February.
- Both the industrial sector, which jumped 26.5% to \$263.1 million and, to a lesser extent, the commercial sector, which increased 12.1% to \$834.1 million, were responsible for this increase. The institutional sector dropped 13.8% to \$279.4 million.
- On a regional basis, losses in non-residential building permits in March were registered in Ontario and British Columbia.





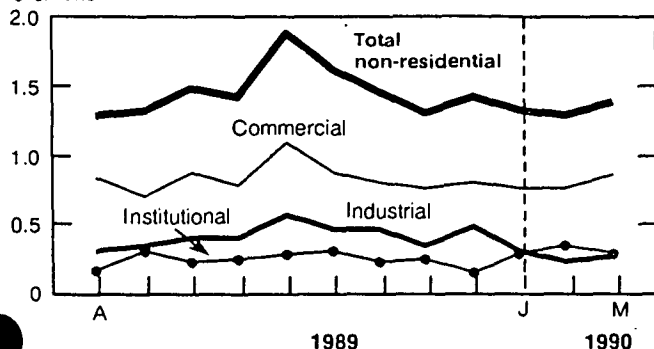
## Short-term Trend

- The short-term trend of construction (excluding engineering projects) remained stable in January 1990 at 148.2.
- The trend index of residential permits rose 1.0% to 171.7 in January 1990, while the non-residential trend index decreased 1.6% to 123.6.

## Value of Non-residential Permits Issued in Canada

Seasonally adjusted

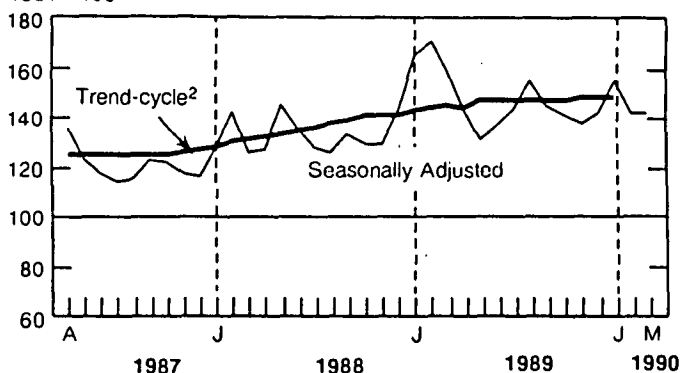
\$ billions



Note: Revised data for February, preliminary data for March.

## Building Permits Indices

1981 = 100<sup>1</sup>



<sup>1</sup> This series is deflated by using the construction input price index which includes cost of material and labor.

<sup>2</sup> The trend-cycle shows the seasonally-adjusted value of Building Permits without irregular influences which can obscure the short-term trend.

Available on CANSIM: matrices 80 (levels 3-7, 9-15), 129, 137, 443, 989-992, 994, 995 and 4073.

The March 1990 issue of *Building Permits* (64-001, \$22/\$220) is scheduled for release the first week of June. See "How to Order Publications".

For further information on this release, contact Pierre Pichette or Marcel Poirier (613-951-2585), or for analysis information Louise Marmen (613-951-2583), Investment and Capital Stock Division. ■

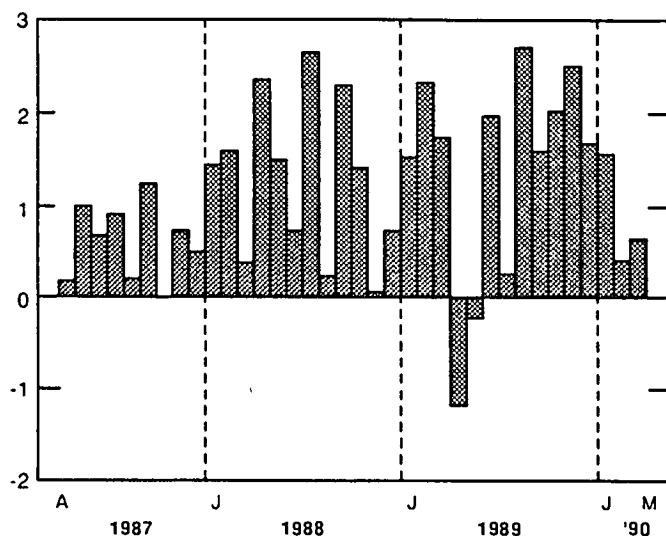


## Security Transactions with Non-residents

(Net sales to non-residents + / net purchases from non-residents -)

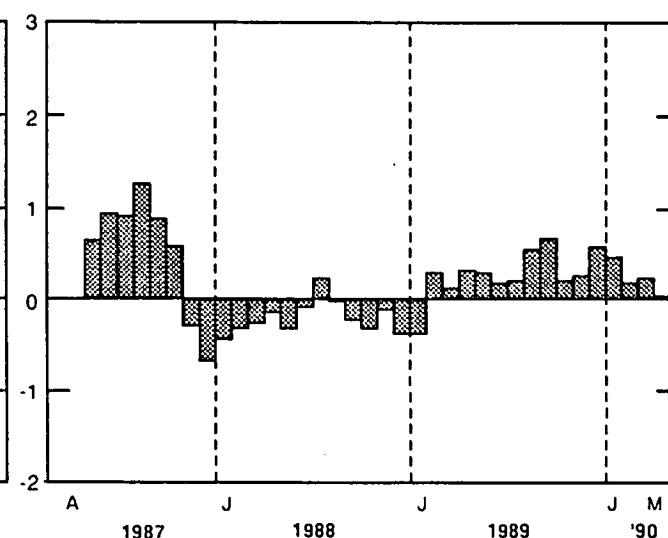
### Canadian Bonds

\$ Billions



### Canadian Stocks

\$ Billions



## Security Transactions with Non-residents

March 1990

### Canadian Securities

In March 1990, non-residents acquired, on a net basis, \$641 million of Canadian bonds, up from February 1990, but well below the strong investments of the previous six months. Although non-residents continued to invest in new issues, they reduced their holdings of outstanding bonds.

New bond sales to non-residents rose to \$2.5 billion, of which \$1.0 billion were United States dollar issues in the United States market and almost \$600 million of new domestic issues of Government of Canada bonds. Retirements increased to \$1.5 billion

in March. New foreign placements, net of retirements, amounted to \$1.1 billion, doubling the net investment of the previous month. Led by higher Canadian rates, the interest rate differentials with the United States reached a recent high in March.

In the secondary market, non-residents reduced their holdings of outstanding Canadian bonds by \$413 million in March, following a small net disinvestment in February. This contrasted with the large investments which have prevailed since June 1989. In the last two months, the net disinvestment came from Japan and the United Kingdom.

Net foreign investment in Canadian stocks was virtually nil in March, following strong monthly investments which averaged over \$300 million per month since January 1989. Canadian stock prices as measured by the TSE 300 Composite Index have been down since the beginning of the year.



## Foreign Securities

Residents acquired, on a net basis, a record \$170 million of overseas stocks, but reduced by \$140 million their United States stocks. As a result, the net change remained small as in previous months. Residents were net sellers of foreign bonds, \$346 million in March, compared to \$552 million in February.

The March 1990 issue of *Security Transactions with Non-residents* (67-002, \$15.80/\$158) will be available in June. See "How to Order Publications".

For further information on this release, contact D. Granger (613-951-1864), Balance of Payments Section, International and Financial Economics Division.

## Security Transactions with Non-residents

(Net sales to non-residents + / net purchases from non-residents -)

Period	Canadian Securities				Foreign Securities			
	Bonds		Stocks	Total	Bonds	Stocks	Total	
	Outstanding bonds (net)	New issues <sup>1</sup>						
\$ millions								
1989								
October	1,259	777	2,036	252	2,288	51	-136	-85
November	757	1,745	2,501	582	3,084	-148	2	-146
December	1,004	670	1,674	457	2,130	-20	-6	-27
1990								
January	608	943	1,551	162	1,713	-639	-94	-733
February	-89	499	410	224	634	552	43	595
March	-413	1,054	641	21	661	346	-46	300
January to March								
1989	2,733	2,866	5,598	690	6,288	-521	413	-108
1990	108	2,495	2,604	397	3,001	254	-117	136

<sup>1</sup> Net of retirements.



## International Travel Account

First Quarter 1990 (Preliminary Estimates)

### Highlights

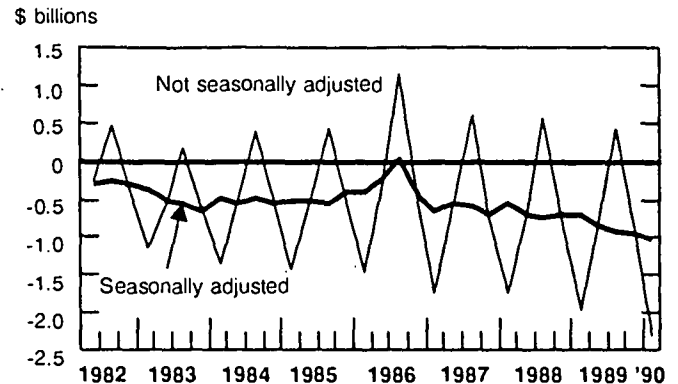
#### Unadjusted

- Unadjusted for seasonal variations, Canada's travel account registered a record deficit of \$2,363 million during the first quarter of the year. The travel balance deteriorated with both the United States and all other countries in the first three months of 1990.
- Receipts from the United States, at \$514 million, were marginally lower than in the same period in the previous year. The record level witnessed in 1988, during the Winter Olympics, has still not been surpassed.
- Receipts from countries other than the United States rose by only 3% over the first quarter of 1989, to \$366 million. It represented the smallest rate of increase in a first quarter since 1985.
- International travel payments by Canadian residents reached \$3,243 million during the first quarter of the year, a record level for that period. Travel expenditures to the United States increased at a stronger rate (16%) than payments to all other countries (9%) in the first three months of the year, compared to the same period in 1989.

#### Seasonally Adjusted

- Canada's first quarter travel deficit, on a seasonally adjusted basis, increased from the revised fourth quarter of 1989, as overall receipts from foreign travellers declined and payments by Canadians travelling abroad continued to increase.

### Travel Account Balance by Quarter, 1982-1989



- Receipts from the United States increased in the first quarter of 1990 over the previous quarter, while those from other countries decreased during the same period.
- After showing a marked improvement during Expo 86, the travel account deficit has maintained a generally downward trend to date, with the only exception being the slight recovery brought by the Winter Olympics in the first quarter of 1988.

The January-March issue of *Travel Between Canada and Other Countries* (66-001,\$38.50/\$154) will be available in July. See "How to Order Publications".

For further information on this release, contact Paul L. Paradis (613-951-8933), International Travel Section, Education, Culture and Tourism Division. □





# International Travel Receipts and Payments

(Millions of \$)

	1989 <sup>P</sup>					1990 <sup>P</sup>
	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	Total	First Quarter
Unadjusted						
<b>United States</b>						
Receipts	517	1,054	2,006	700	4,277	514
Payments	1,783	1,798	1,698	1,331	6,610	2,069
Balance	-1,266	-744	308	-631	-2,333	-1,555
<b>All other countries</b>						
Receipts	356	797	1,288	514	2,955	366
Payments	1,074	976	1,189	867	4,106	1,174
Balance	-718	-179	99	-353	-1,151	-808
<b>Total, all countries</b>						
Receipts	873	1,851	3,294	1,214	7,232	880
Payments	2,857	2,774	2,887	2,198	10,716	3,243
Balance	-1,984	-923	407	-984	-3,484	-2,363
Seasonally Adjusted						
	1989 <sup>P</sup>					1990 <sup>P</sup>
	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	Total	First Quarter
<b>United States</b>						
Receipts	1,080	1,061	1,068	1,068	4,277	1,073
Payments	1,539	1,622	1,693	1,755	6,610	1,808
Balance	-459	-561	-626	-687	-2,333	-736
<b>All other countries</b>						
Receipts	734	720	738	762	2,955	754
Payments	979	1,036	1,043	1,048	4,106	1,073
Balance	-245	-316	-305	-286	-1,151	-319
<b>Total, all countries</b>						
Receipts	1,814	1,781	1,806	1,831	7,232	1,827
Payments	2,518	2,658	2,737	2,803	10,716	2,882
Balance	-704	-877	-930	-973	-3,484	-1,055

\* Seasonally adjusted data may not add to totals due to rounding.

<sup>P</sup> Preliminary figures.



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## DATA AVAILABILITY ANNOUNCEMENTS

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### Air Carrier Fare Basis Statistics

January-June 1989 (Preliminary Estimates)

Preliminary estimates on fare type utilization for the first two quarters of 1989 are now available.

Data reported by three major Canadian air carriers – Air Canada, Canadian Airlines International Ltd. and Wardair – indicate that 59.6% of passengers carried on domestic scheduled services travelled on discount fares during the first two quarters of 1989, down from 61.9% for the corresponding period in 1988. In terms of passenger-kilometres, discount fares accounted for 65.8% of total volume in 1989, while the comparable figure for the first two quarters of 1988 was 66.7%.

Long-haul services in the domestic southern sector showed the highest rate of discount fare utilization – 66.5% of passengers in this traffic category travelled on a discount fare during the first two quarters of 1989. (This is on city-pairs, within the "deregulated" zone as defined in the new 1984 Canadian Air Policy, involving distances of 800 kilometres or more as determined by the flight coupon origin and destination.)

The Vol. 22, No. 6 issue of the *Aviation Statistics Centre Service Bulletin* (51-004, \$9.30/\$93) will be available in June. See "How to Order Publications".

For further information on this release, contact Lisa Di Piéto (819-997-6176), Aviation Statistics Centre, Transportation Division. ■

### Canadian Civil Aviation Statistics

March 1990

Preliminary monthly operational and financial data for March 1990 are now available. Data reported show that the Canadian Level I air carriers (Air Canada and Canadian Airlines International Ltd.) had an operating loss of \$95.8 million in the first quarter of 1990.

Available on CANSIM: matrix 385.

The June 1990 issue of the *Aviation Statistics Centre Service Bulletin* (51-004, \$9.30/\$93), which contains preliminary civil aviation data, will be available shortly. See "How to Order Publications".

For more information on this release, contact Katerina Tieman (819-997-6188), Aviation Statistics Centre, Transportation Division. ■

### Steel Primary Forms (Steel Ingots)

Week Ending May 19, 1990

Preliminary estimates indicate that Canadian steel primary forms production for the week ending May 19, 1990 totalled 296 125 tonnes, a decrease of 6.7% from the preceding week's total of 317 282 tonnes and down 4.5% from the year-earlier level of 309 983 tonnes. The cumulative total in 1990 was 5 525 599 tonnes, a decrease of 11.2% from 6 225 071 tonnes for the same period in 1989.

For further information on this release, contact Greg Milsom (613-951-9827), Industry Division. ■

### Electric Lamps

April 1990

Canadian light bulb and tube manufacturers sold 18,390,055 light bulbs and tubes in April 1990, a decrease of 6.2% from the 19,602,828 units sold a year earlier.

Year-to-date sales for 1990 amounted to 82,020,317 light bulbs and tubes, down 0.6% from the 82,486,052 sold during the same period in 1989.

The April 1990 issue of *Electric Lamps* (43-009, \$5/\$50) will be available at a later date. See "How to Order Publications".

For further information on this release, contact Laurie Vincent (613-951-3523), Industry Division. ■



## **Shipments of Office Furniture Products**

First Quarter 1990

For the quarter ending March 31, 1990, shipments of office furniture products totalled \$218.9 million, a decrease of 0.6% compared to \$220.3 million shipped during the same quarter of the previous year.

Manufacturers' shipments of office furniture products for the first quarter of 1990 are now available. Data for province of destination as well as exports are also available.

The March 1990 issue of *Shipments of Office Furniture Products* (35-006, \$6.75/\$27) will be available shortly. See "How to Order Publications".

For further information on this release, contact Keith Martin (613-951-3518), Industry Division. ■

## **Vegetable Oil Mills (except Corn Oil) Industry**

1988 Annual Survey of Manufactures

In 1988, the value of shipments and other revenue for the vegetable oil mills industry (SIC 1061) totalled \$1,332.5 million, up 26.9% over \$1,050.2 million in 1987.

**Available on CANSIM: matrix 5390.**

The publication *Food Industries* (32-250, \$35) will be released at a later date. See "How to Order Publications".

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



## PUBLICATIONS RELEASED

**The Sugar Situation**, April 1990. ✓

**Catalogue number 32-013**

(Canada: \$5.00/\$50.00; United States: US\$6.00/US\$60.00; Other Countries: US\$7.00/US\$70.00).

**Fruit and Vegetable Preservation Service Bulletin**, Vol. 18, No. 23, **Pack of Apples and Apple Products**, 1988.

**Catalogue number 32-023**

(Canada: \$7.80/\$127.00; United States: US\$9.30/US\$152.00; Other Countries: US\$10.90/US\$178.00).

**Production and Stocks of Tea, Coffee and Cocoa**, Quarter Ended March 1990. ✓

**Catalogue number 32-025**

(Canada: \$6.75/\$27.00; United States: US\$8.00/US\$32.00; Other Countries: US\$9.50/US\$38).

**Consumer Prices and Price Indexes**, October-December 1989.

**Catalogue number 62-010**

(Canada: \$18/\$72.00; United States: US\$21.50/US\$86.00; Other Countries: US\$25.25/US\$101.00).

### How to Order Publications

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*Please enclose cheque or money order payable to the Receiver General for Canada/Publications and provide full information on publications required (catalogue number, title, issue).*

*Publications may also be ordered through Statistics Canada's offices in St. John's, Halifax, Montreal, Ottawa, Toronto, Winnipeg, Regina, Edmonton, Calgary and Vancouver, or from authorized bookstore agents or other booksellers.*

*A national toll-free telephone order service is now in operation at Statistics Canada. The toll-free line (1-800-267-6677) can be used by Canadian customers for the ordering of Statistics Canada products and services.*

**The  
Daily**

### Statistics Canada's Official Release Bulletin for Statistical Information

Catalogue 11-001E. Price: Canada: \$120.00 annually; United States: US\$144.00 annually; Other Countries: US\$168.00 annually

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## MAJOR RELEASE DATES

**Week of May 28 - June 1**  
(Release dates are subject to change)

Anticipated date(s) of release	Title	Reference period
<b>May</b>		
29	Department Store Sales and Stocks	March 1990
29	Industrial Corporations: Financial Statistics	First Quarter 1990
29	Wholesale Trade	March 1990
30	Unemployment Insurance Statistics	March 1990
31	Gross Domestic Product at Factor Cost by Industry	March 1990
31	Industrial Product Price Index	April 1990
31	Raw Materials Price Index	April 1990
31	Employment, Earnings and Hours	March 1990
31	Sales of Refined Petroleum Products	April 1990
31	Crude Petroleum and Natural Gas	February 1990
31	Farm Cash Receipts	January - March 1990
31	Farm Net Income	1989

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