

The Daily

Statistics Canada

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MAJOR RELEASES

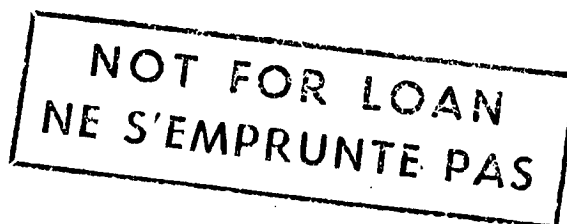
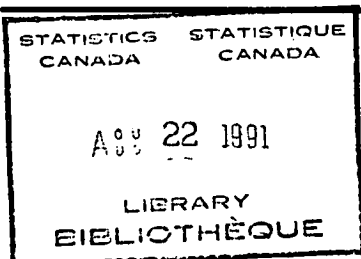
- **Retail Trade, June 1991** 2
Seasonally adjusted, retail sales were unchanged in June as a broadly-based decline was offset primarily by the higher sales of motor vehicle and recreational vehicle dealers.
- **Farm Cash Receipts, January-June 1991** 4
Farm cash receipts dropped 4% from the previous year to \$10.6 billion for the period January-June 1991.

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Retail Trade

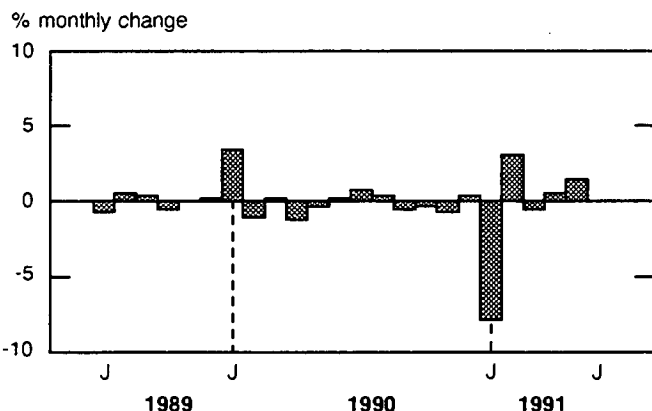
June 1991

Highlights

Seasonally Adjusted Sales

- Preliminary estimates indicate retail trade showed no growth in June, maintaining a level of \$15.2 billion. However, excluding motor vehicle and recreational vehicle dealers, retail sales declined 1.2% in the month.

Retail Sales, Canada, Seasonally Adjusted



- In spite of the unchanged level in June, retail sales increased by 2.1% in the second quarter compared to a decline of 2.1% (after adjustment for taxes) in the first quarter of 1991.
- The flat growth rate in June resulted from a broadly-based decline that was offset primarily by the increase for motor vehicle and recreational vehicle dealers (4.3%). In order of dollar impact, the most significant drops were reported by other semi-durable goods stores (-6.4%), general merchandise stores (-1.7%) and automotive parts, accessories and services stores (-3.0%).
- The increase in sales of motor vehicle and recreational vehicle dealers marked the third consecutive monthly gain. The decline by other semi-durable goods stores followed a 5.4%

Note to Users

Retail sales estimates exclude the Goods and Services Tax (GST). Prior to January 1991, sales data included the Federal Sales Tax (FST). Due to this change in indirect taxes, data for 1991 are not strictly comparable with those of previous years. For users interested in deriving comparable data, an estimate of the amount of FST included in retail sales for 1990 is available for Canada. The reliability of this estimate does not permit adjustments at the provincial or trade-group level.

increase in May and the sales decrease in general merchandise stores followed a 1.9% gain in May. Among the other major trade groups, sales by supermarkets and grocery stores advanced by 0.3% while sales by gasoline service stations fell 1.0%.

- Fluctuations in provincial sales were moderate. Half of the provinces posted sales increases, ranging from 0.7% in Newfoundland to 0.1% in Manitoba. Notable declines were registered in Nova Scotia (-1.8%) and British Columbia (-1.5%). Sales increased by 1.5% in the Northwest Territories and fell by 2.7% in the Yukon.

Year-to-date

- Cumulative retail sales for the first half of 1991 amounted to \$89.8 billion, down 2.4% from the corresponding period in 1990 (after removing federal sales tax from the 1990 data).

Available on CANSIM: matrices 2399 (seasonally adjusted), 2400 (not seasonally adjusted), 2398 (department store type merchandise totals for the provinces and territories), and 2299, 2401-2417 (quarterly trade-group estimates for Canada, the provinces and territories).

The June 1991 issue of *Retail Trade* (63-005, \$18.20/\$182) will be available the first week of September. See "How to Order Publications".

For more detailed 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

June 1991

Trade group	Unadjusted				Seasonally Adjusted						
	June 1990	May 1991 ^r	June 1991 ^p	June 1991/ June 1990 [*]	June 1990	March 1991 ^r	April 1991 ^r	May 1991 ^r	June 1991 ^p	June 1991/ May 1991	June 1991/ June 1990 [*]
	millions of	%		%	millions of	%		%		%	
Canada											
Supermarkets and grocery stores	3,755.5	3,879.4	3,738.7	-0.4	3,482.7	3,632.5	3,616.6	3,618.6	3,628.6	0.3	4.2
All other food stores	363.5	347.1	343.4	-5.5	334.4	319.0	299.0	320.6	315.7	-1.5	-5.6
Drug and patent medicine stores	754.6	765.9	714.6	-5.3	761.7	751.2	752.2	757.4	738.8	-2.5	-3.0
Shoe stores	169.0	148.9	144.5	-14.5	154.4	133.1	131.9	135.6	134.9	-0.5	-12.6
Men's clothing stores	181.0	152.8	155.2	-14.3	170.8	148.8	145.3	148.1	147.8	-0.2	-13.4
Women's clothing stores	352.1	325.6	306.4	-13.0	337.4	300.8	302.6	305.7	299.3	-2.1	-11.3
Other clothing stores	325.0	300.5	300.4	-7.6	336.2	321.4	311.3	317.5	315.7	-0.6	-6.1
Household furniture and appliance stores	731.8	579.2	601.5	-17.8	724.2	617.1	623.9	610.4	613.8	0.6	-15.2
Household furnishings stores	250.3	175.9	172.9	-30.9	231.3	169.9	170.7	171.4	165.1	-3.6	-28.6
Motor vehicle and recreational vehicle dealers	3,887.2	4,012.8	3,621.6	-6.8	3,460.3	2,949.0	3,033.6	3,177.7	3,315.9	4.3	-4.2
Gasoline service stations	1,320.3	1,218.0	1,189.1	-9.9	1,255.8	1,156.8	1,182.0	1,165.3	1,153.2	-1.0	-8.2
Automotive parts, accessories and services	1,141.7	1,054.4	966.4	-15.4	1,002.7	903.9	920.4	915.8	888.5	-3.0	-11.4
General merchandise stores	1,723.1	1,752.6	1,650.2	-4.2	1,743.7	1,733.5	1,728.0	1,760.5	1,731.2	-1.7	-0.7
Other semi-durable goods stores	659.3	648.4	562.9	-14.6	594.5	529.4	529.2	557.5	522.0	-6.4	-12.2
Other durable goods stores	465.4	419.8	396.3	-14.8	446.0	395.0	408.5	412.1	393.7	-4.5	-11.7
All other retail stores	940.8	896.3	889.5	-5.5	832.5	852.2	835.9	829.7	833.2	0.4	0.1
Total, all stores	17,020.5	16,677.6	15,753.5	-7.4	15,868.5	14,913.5	14,991.2	15,203.9	15,197.6	--	-4.2
Total excluding motor vehicle and recreational vehicle dealers	13,133.3	12,664.8	12,132.0	-7.6	12,408.1	11,964.6	11,957.6	12,026.2	11,881.7	-1.2	-4.2
Department store type merchandise	5,611.6	5,269.5	5,004.9	-10.8	5,500.1	5,100.2	5,103.6	5,176.2	5,062.5	-2.2	-8.0
Regions											
Newfoundland	313.7	315.0	297.9	-5.0	291.5	275.8	277.6	283.1	285.2	0.7	-2.2
Prince Edward Island	74.2	65.4	65.6	-11.7	66.0	60.0	60.3	60.0	60.2	0.4	-8.7
Nova Scotia	541.9	532.4	496.1	-8.5	511.6	483.8	489.8	493.9	485.2	-1.8	-5.2
New Brunswick	452.9	436.1	416.5	-8.0	425.2	383.2	395.3	399.6	401.9	0.6	-5.5
Quebec	4,307.6	4,354.3	3,935.4	-8.6	3,980.4	3,712.4	3,713.9	3,776.1	3,738.1	-1.0	-6.1
Ontario	6,297.7	6,066.0	5,812.8	-7.7	5,842.5	5,439.1	5,443.5	5,585.9	5,572.6	-0.2	-4.6
Manitoba	589.9	565.4	540.4	-8.4	548.0	514.7	516.9	518.1	518.5	0.1	-5.4
Saskatchewan	519.1	473.5	463.1	-10.8	473.9	443.6	432.2	441.9	439.2	-0.6	-7.3
Alberta	1,772.2	1,683.9	1,650.1	-6.9	1,666.0	1,567.1	1,586.9	1,580.7	1,588.0	0.5	-4.7
British Columbia	2,099.0	2,137.1	2,025.3	-3.5	1,980.6	1,956.9	1,974.6	2,011.7	1,982.0	-1.5	0.1
Yukon	18.3	17.2	17.2	-5.8	16.0	14.5	15.3	15.6	15.2	-2.7	-4.8
Northwest Territories	33.9	31.3	33.1	-2.2	31.2	29.6	29.7	30.2	30.6	1.5	-2.0

^{*} Percentage changes contained in this table are not adjusted for the change in indirect taxes. Caution should be exercised in their use.

^r Revised.

^p Preliminary.

-- Too small to be expressed.

Farm Cash Receipts

January-June 1991

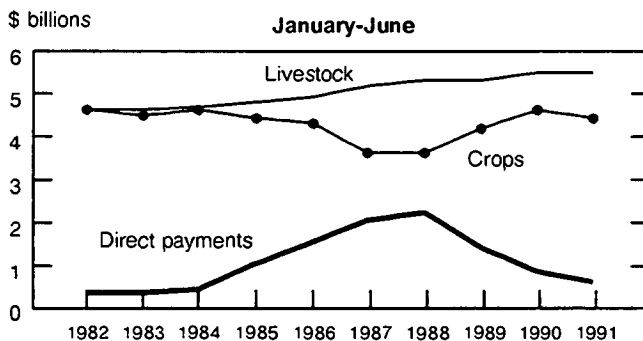
Farm cash receipts for January to June 1991 fell 4% compared to the same period a year earlier to \$10.6 billion. Crop receipts dropped 5% and direct program payments declined 21%, while livestock receipts remained virtually unchanged.

All of the provinces registered declines in farm cash receipts. Prince Edward Island and New Brunswick experienced the largest drops, 20% and 12%, respectively, due to decreases in potato receipts. Other declines ranged from 5% in Ontario to 0.2% in Newfoundland.

Crop Receipts

Crop receipts for the first six months of 1991 were \$4.4 billion, 5% below year-earlier levels. Responsible for the decrease were smaller Canadian Wheat Board payments, fewer liquidations of deferred grain receipts and lower corn, potato and soybean receipts.

Farm Cash Receipts, Canada



- Canadian Wheat Board payments made during the first half of 1991 fell to \$315 million from \$423 million. The final payment made January 1991 for the 1989/1990 (August 1 to July 31) wheat, excluding durum, crop was \$208 million. This was 22% below the final payment a year earlier. There was also a \$71 million adjustment payment for wheat made in February 1990 because of an increase in initial prices.
- Grain receipts cashed in 1991 for grain marketed in 1990 were \$430 million, compared to the \$507 million liquidated the previous year.

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, 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 (21-603E).

- Corn and soybean receipts dropped 26% and 27%, respectively, as both marketings and prices fell. Depressed prices and the restoration of the interest-free option for the Advance Payments for Crops Act Program may have contributed to the lower marketings. Prices for all grains and oilseeds were below year-earlier levels; the declines ranged from 5% for soybeans to 49% for flaxseed. Ample supply, weak world demand and the prospect of a good 1991 grain crop has put downward pressure on grain prices.
- Potato receipts, at \$191 million, were 17% below the January-June 1990 level. The 4% increase in marketings failed to offset a 20% drop in prices. Partial restriction of seed exports to the U.S. because of the PVYn virus contributed to the lower prices.

Direct Program Payments

Direct program payments fell 21% to \$641 million. Sharp declines in crop insurance and tripartite payments were responsible for the drop. A payment under the Western Grain Stabilization Act (WGSA) partially offset the decrease. Since 1983, payments for the January-June period increased steadily to peak in 1988 where they contributed 20% to total farm cash receipts. From 1988, program payments continuously declined to 1991, where they represented only 6% of total farm cash receipts.

- Crop insurance payments fell to \$75 million from \$315 million because of better growing conditions in 1990. This compares to the previous five-year average of \$233 million when drought conditions prevailed in several years.

- Payments under tripartite plans took a sharp drop (90%) to \$14 million due to lower payments for hogs. Hog prices have been relatively strong since early 1990.
- A WGSa interim payment of \$158 million was made during the first quarter of 1991. This was the first interim payment since 1988 and was well below the \$505 million average paid between 1984 and 1988.

Livestock Receipts

Livestock and animal product receipts remained virtually unchanged at the record \$5.5 billion level reached last year for the same period. Livestock receipts were responsible for 52% of total farm cash receipts.

Receipts for eggs and calves rose, offsetting a 2% decline in hog receipts. Cattle, poultry and dairy receipts remained unchanged.

- Receipts for cattle were unchanged at \$1.9 billion. Both prices and quantities marketed remained stable, although the proportion of animals slaughtered and exported changed. Exports of live animals were up 11% while the number of animals slaughtered declined 7%.
- Egg receipts rose 5% to \$240 million because of a slight increase in marketings and a 4% rise in prices.
- Hog receipts dropped 2% to \$990 million mainly because of lower marketings. A reduction in the number of hogs slaughtered was responsible for the decline as live exports increased 17%.

Available on CANSIM: matrices 3582 to 3592.

Order the January-June 1991 issue of *Farm Cash Receipts* (21-001, \$11/\$44), scheduled for release September 3. See "How to Order Publications".

For further information on this release, contact Gail-Ann Breese (613-951-0375), Agriculture Division.

Total Cash Receipts from Farming Operations

January-June

	1991	1990	1991/1990
	(millions of dollars)		% Change
Newfoundland	28.3	28.4	- 0.2
Prince Edward Island	112.0	140.1	-20.0
Nova Scotia	139.7	140.4	- 0.5
New Brunswick	121.7	138.3	-12.0
Quebec	1,787.5	1,845.1	- 3.1
Ontario	2,499.4	2,627.3	- 4.9
Manitoba	1,009.3	1,049.7	- 3.9
Saskatchewan	2,110.2	2,152.8	- 2.0
Alberta	2,156.1	2,252.0	- 4.3
British Columbia	590.5	592.6	- 0.3
Canada	10,554.8	10,966.8	- 3.8

Note: Totals may not add due to rounding.

DATA AVAILABILITY ANNOUNCEMENTS

Production, Shipments and Stocks of Sawmills East of the Rockies

June 1991

Production of lumber in sawmills east of the Rockies decreased 8.6% to 1 747 173 cubic metres in June 1991 from 1 911 078 cubic metres after revisions in June 1990.

Stocks on hand at the end of June 1991 totalled 2 798 533 cubic metres, an increase of 18.4% compared to 2 363 030 cubic metres in June 1990.

Year-to-date production in 1991 amounted to 10 279 607 cubic metres, a decrease of 11.4% compared to 11 599 298 cubic metres after revisions for the same period in 1990.

Available on CANSIM: matrices 53 (except 1.2, 2.2 and 3.2) and 122 (series 2).

The June 1991 issue of *Production, Shipments and Stocks on Hand of Sawmills East of the Rockies* (35-002, \$10/\$100) will be available at a later date. See "How to Order Publications".

For more detailed information on this release, contact Jacques Lepage (613-951-3516), Industry Division. ■

Production, Shipments and Stocks on Hand of Sawmills in British Columbia

June 1991

Sawmills in British Columbia produced 2 814 000 cubic metres of lumber and ties in June 1991, a decrease of 3.0% from the 2 901 700 cubic metres produced in June 1990.

January to June 1991 production was 15 815 200 cubic metres, a decrease of 11.5% from the 17 875 100 cubic metres produced over the same period in 1990.

Available on CANSIM: matrix 53 (series 1.2, 2.2 and 3.2).

The June 1991 issue of *Production, Shipments and Stocks on Hand of Sawmills in British Columbia* (35-003, \$7.10/\$71) will be available at a later date. See "How to Order Publications".

For more detailed information on this release, contact Jock Dobie (604-666-2671, Pacific Region, Statistics Canada, Sinclair Centre, 757 West Hastings Street, Vancouver, B.C. V6C 3C9. ■

Steel Primary Forms

Week Ending August 17, 1991

Preliminary estimates indicate that Canadian steel primary forms production for the week ending August 17, 1991 totalled 257 289 tonnes, a decrease of 0.5% from the preceding week's total of 258 513 tonnes but up 70.1% from the year-earlier level of 151 255 tonnes. The cumulative total in 1991 was 8 018 277 tonnes, a decrease of 8.6% from 8 769 069 tonnes for the same period in 1990.

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

Short-term Debt of Local Governments

June 1991

At June 30, 1991, estimates of the short-term debt (treasury bills and other short-term paper) of local governments totalled \$447 million, down \$220 million (67%) from March 1991 and down \$73 million from June 30, 1990. Revised estimates for previous quarters are also available.

For further information on these data, contact Marlene Vollmer (613-951-1830), Public Institutions Division.

For more information, or general inquiries on Public Institutions Division's products or services, contact Patricia Phillips (613-951-0767). ■

Grain Marketing Situation Report

July 1991

The situation report for July 1991 is now available. This report presents up-to-date information on the Canadian and world grain supply and market situation.

For further detailed information on this release, contact Karen Gray (204-983-2856), Agriculture Division. ■

PUBLICATION RELEASED

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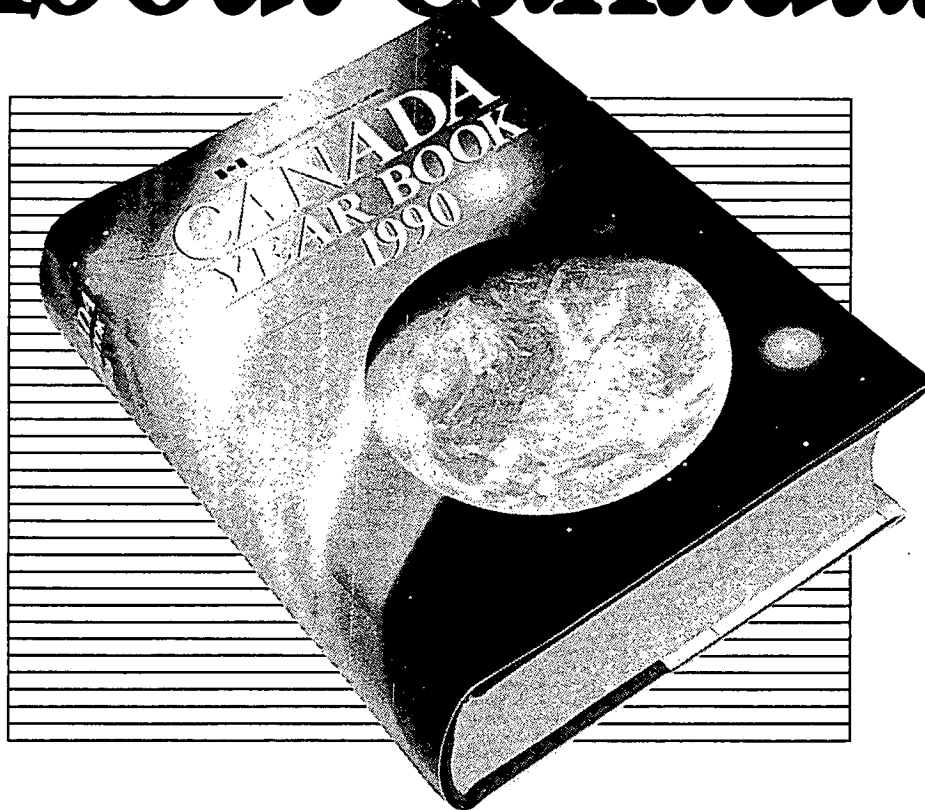
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