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MAJOR RELEASES

- **Consumer Price Index, December 1991** 2

In December, the CPI year-to-year increase was 3.8%, down from the 4.2% increase reported in November.
- **Retail Trade, November 1991** 9

Higher sales by motor vehicle and recreational vehicle dealers (+ 4.1%) increased seasonally adjusted total retail sales in November by 0.7%. Nevertheless, excluding motor vehicle and recreational vehicle sales by dealers, retail sales fell 0.2%.
- **Sales of Natural Gas, November 1991** 12

Sales of natural gas (including direct sales) in Canada during November 1991 totalled 5 504 million cubic metres, a 6.2% increase over the level recorded the previous year.

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MAJOR RELEASES

Consumer Price Index

December 1991

National Highlights

All-items

The All-items Consumer Price Index (CPI) for Canada fell by 0.5% between November and December to a level of 126.4 (1986 = 100), following a rise of 0.4% in November and declines of 0.2% in both September and October. The latest monthly decrease of 0.5% resulted from declines in four of the major component indexes: Transportation (-1.0%), Food (-0.8%), Clothing (-0.9%) and Housing (-0.2%). There was no change in the remaining three major component indexes.

The year-over-year increase in the CPI between December 1990 and December 1991 was 3.8%, the lowest rate of inflation since July 1988, continuing a downward trend since the sharp rise of 6.8% posted when the GST was introduced in January 1991. The increase calculated from the annual average for 1991 was 5.6% compared to the annual average increase of 4.8% for 1990.

In seasonally adjusted terms, the All-items index remained unchanged in December compared to a revised 0.2% increase observed in November. (See Note to Users box on page four, which explains the revision made to the seasonally adjusted data.)

The compound annual rate of increase, based on the seasonally adjusted index levels over the latest three-month period (September to December), was zero. This followed a revised increase of 0.3% for the three months ending in both October and November.

Food

The Food index fell each month from July to October, rose 0.2% in November and declined again by 0.8% in December. The latest movement resulted from a fall of 1.2% in the index for Food Purchased from Stores that was offset, minimally, by a rise of 0.1% in the index for Food Purchased from Restaurants.

A major proportion of the 1.2% drop in the index for Food Purchased from Stores resulted from declines of 6.8% and 3.4% in the indexes for Fresh Fruit and Fresh Vegetables, respectively. Much of the

weakness in the former was found in lower prices for bananas and oranges due to increased seasonal supplies. The drop in the prices of fresh vegetables resulted mainly from lower prices for lettuce, tomatoes and potatoes that were offset, in part, by higher prices for cabbages, carrots and onions. Prices of beef, pork and turkey products also fell in December, largely due to increased supplies. At the same time, chicken prices rose from the lower promotional prices observed in November. The Food index was driven down further by seasonally lower prices for soft drinks and snack food.

Over the 12-month period, December 1990 to December 1991, the Food index rose by 2.2%. This was the result of a 9.4% advance in the index for Food Purchased from Restaurants that was counterbalanced, to a large extent, by a decline of 0.9% in the index for Food Purchased from Stores.

All-items excluding Food

On a month-to-month basis, the All-items excluding Food index fell by 0.4% in December after rising by 0.4% in November. Declines in the indexes for Transportation (-1.0%), Clothing (-0.9%) and Housing (-0.2%) accounted for the latest overall fall.

Most of the 1.0% decline in the Transportation index was attributable to lower prices for gasoline (-3.5%) and new automobiles (-1.0%). December marked the third consecutive month in which gasoline prices fell. Continued downward pressures on crude oil prices accompanied by excess supplies and a slackening demand accounted for this performance. Automobile prices fell as manufacturers' rebates on selected North American model cars were increased over their November levels. Seasonally lower rental charges on automobiles also contributed to the overall downward pressure. This was partially offset by a seasonal rise in air fares to selected European and Southern destinations.

Declines in the Women's Wear and Men's Wear indexes of 0.7% and 1.8%, respectively, accounted for the bulk of the 0.9% fall in the Clothing index. December was the fourth month in a row in which this index has fallen, and altogether this index fell in seven months of 1991. This high frequency of declining price movements indicates the extent to which retailers resorted to promotional pricing to try to stimulate consumer spending in a sluggish market.

The Housing index fell by 0.2%, largely due to seasonally reduced rates for hotel/motel accommodation, lower owned accommodation charges and a drop in prices for selected household textiles and appliances. The Owned Accommodation index fell by 0.1% as the effect of lower mortgage interest costs and a drop in new house prices were partially offset by higher homeowners' maintenance and repair charges. The mortgage interest cost index has been declining since June, while new house prices fell in five months of 1991. Increased rental accommodation charges and higher prices for fuel oil, piped gas and furniture had a small restraining effect on the overall downward movement of the Housing index.

The Recreation, Reading and Education index remained unchanged as a fall in the prices of photographic goods and home entertainment equipment was completely offset by higher prices for reading material. The indexes for both Health and Personal Care and for Tobacco Products and Alcoholic Beverages also registered no change in December, and little variation was noted in their components.

Over the 12-month period, December 1990 to December 1991, the All-items excluding Food index increased by 4.1%, down from the advance of 4.5%

reported for November. The latest rise was the smallest since September 1988.

All-items excluding Food and Energy

In December, the All-items excluding Food and Energy index fell by 0.3%, following three months of accelerated price increases. Over the 12-month period, December 1990 to December 1991, the index rose by 5.0%, down slightly from the 5.2% increase noted in both October and November.

Goods and Services

The Goods index fell by 0.8% in December, following a rise of 0.5% in November and four months of continuous decline between July and September. The latest drop resulted from a decline of 0.7% in the Durable Goods index and a drop of 0.8% in both the Semi-Durable and the Non-Durable Goods indexes. Over the 12-month period, December 1990 to December 1991, the Goods index rose by a 15-year record low of 2.7%. In December, the Services index fell by 0.2%, the first monthly drop in four years. Between December 1990 and December 1991, the index rose by 5.0%, less than the increase of 5.3% reported in November.

The Consumer Price Index and Major Components (Not Seasonally Adjusted), Canada (1986 = 100)

	Indexes			Percentage change December 1991 from	
	December 1991	November 1991	December 1990	November 1991	December 1990
All-items	126.4	127.0	121.8	-0.5	3.8
Food	118.7	119.6	116.1	-0.8	2.2
Housing	125.5	125.7	121.4	-0.2	3.4
Clothing	127.1	128.3	117.3	-0.9	8.4
Transportation	119.3	120.5	122.2	-1.0	-2.4
Health and personal care	128.8	128.8	122.1	0.0	5.5
Recreation, reading and education	132.1	132.1	124.7	0.0	5.9
Tobacco products and alcoholic beverages	165.2	165.2	140.2	0.0	17.8
All-items excluding food	128.1	128.6	123.0	-0.4	4.1
All-items excluding food and energy	128.9	129.3	122.8	-0.3	5.0
Goods	122.0	123.0	118.8	-0.8	2.7
Services	131.6	131.8	125.3	-0.2	5.0
Purchasing power of the consumer dollar expressed in cents, compared to 1986	79.1	78.7	82.1		
All-items (1981 = 100)	167.4				

Percentage Change in the Annual Average, Canada and Cities, 1991

Quebec City	7.5	Ottawa	5.7
Montreal	7.5	Victoria	5.7
Charlottetown/Summerside	7.5	Edmonton	5.6
Saint John	6.5	Regina	5.4
St. John's	6.1	Vancouver	5.2
Calgary	6.0	Saskatoon	5.2
Halifax	5.8	Winnipeg	5.1
Thunder Bay	5.8	Toronto	4.2
Canada	5.6		

Annual Averages

The 1991 annual average in the All-items index for Canada was 5.6%, up sharply from the 1990 annual average of 4.8%. The higher annual average was essentially due to the introduction of the GST in January 1991, mitigated, to some extent, by lower rates of inflation in recent months. Increases in the major component indexes for 1991 ranged from 1.8% for Transportation to 17.2% for Tobacco Products and Alcoholic Beverages. In addition to the minimal rise noted in Transportation, lower than average increases were posted by the Housing (4.4%) and Food (4.8%) indexes. The large advance found in the Tobacco Products and Alcoholic Beverages index was accompanied by higher than average increases in the indexes for Clothing (9.5%), Recreation, Reading and Education (7.3%), and Health and Personal Care (7.0%).

In cities for which CPI's are published, annual averages for 1991 varied from 4.2% in Toronto to 7.5% in Quebec City, Montreal and Charlottetown/Summerside. In addition to Toronto, all the Western cities, with the exception of Calgary and Victoria, registered increases that were equal to or below the Canada average of 5.6%.

City Highlights

Between November and December, declines in the All-items indexes for cities for which CPIs are published fluctuated between -0.8% in Charlottetown/Summerside to -0.2% in Regina. In Charlottetown/Summerside significantly larger than average price declines were registered in the Food and Clothing indexes. In Regina a smaller drop was observed in the Food index, while increases were

noted in the Health and Personal Care index, in the Recreation, Reading and Education index and in the Tobacco Products and Alcoholic Beverages index. These latter three indexes registered no change at the Canada level.

Between December 1990 and December 1991, increases in city CPIs ranged between a low of 2.3% in Saskatoon to a high of 5.5% in Montreal.

Note To Users

With the CPI for December 1991, a change in the seasonally adjusted procedure was introduced. Prior to this time, the All-items seasonally adjusted CPI was calculated as an aggregate of its seasonally adjusted major component indexes with the exception of the Transportation index, which was used in an unadjusted form. Recent examination of the Transportation index revealed the presence of some seasonality occurring, particularly in the month of November when new automobile models are introduced into the CPI. As a result, the revised procedure now incorporates this index in a seasonally adjusted form. Owing to noticeable differences to the adjusted movement for November, the revised adjusted indexes are released with the December data. This is a slight departure from past practices, when revised seasonally adjusted indexes were published with the release of the CPI for January.

Main Contributors to Monthly Changes in the All-items Index, by City

St. John's

The All-items index fell 0.7%. A decline in the Food index, reflecting lower prices for soft drinks, fresh fruit, chicken, dairy products and bakery products, accounted for a substantial portion of the overall decline. The Housing index also fell, largely due to decreased charges for traveller and owned accommodation, lower household operating expenses, and decreased prices for household furnishings and equipment. Lower prices for automotive vehicles were also noted. Since December 1990, the All-items index has risen 3.0%.

Charlottetown/Summerside

The All-items index fell 0.8%. Five of the major components declined, while two (Housing and Tobacco Products and Alcoholic Beverages) remained

unchanged. The largest downward impact originated in the Food index, where lower prices for fresh produce, soft drinks, sugar and pork were observed. Further downward pressure resulted from lower prices for clothing and decreased charges for both the purchase and rental of automotive vehicles. Lower prices for personal care supplies and home entertainment equipment were also noted. Since December 1990, the All-items index has risen 4.7%.

Halifax

Declines in the Food and Housing components were among the main contributors to the 0.6% decline in the All-items index. Within the Food index, lower prices were observed for fresh fruit, and, to a lesser extent, for fresh vegetables, soft drinks, cured meats and sugar. The fall in the Housing index was mainly due to decreased charges for owned and traveller accommodation, and lower prices for household textiles and equipment. Decreased transportation charges, most notably for the purchase and rental of automotive vehicles, and lower clothing prices also contributed notably to the overall downward movement. Since December 1990, the All-items index has risen 3.0%.

Saint John

A 0.4% fall in the All-items index resulted from declines in five of the seven major component indexes. The Food index declined, reflecting lower prices for fresh fruit, soft drinks, cured meats and sugar. Declines in the Clothing and Transportation indexes (the latter due to lower prices for automotive vehicles) also exerted a notable downward influence. In addition, price declines for home entertainment equipment and recreational equipment were reported. The Housing index declined slightly. Since December 1990, the All-items index has risen 4.2%.

Quebec City

The All-items index fell 0.7%, with the greatest downward contributions originating in the Food and Transportation indexes. Within the Food index, lower prices for fresh produce were largely responsible for the decline, while the fall in the Transportation index reflected lower prices for gasoline and automotive vehicles. Declines in the Clothing and the Recreation, Reading and Education indexes also exerted some downward impact. Since December 1990, the All-items index has risen 4.9%.

Montreal

Six of the seven major component indexes fell (Housing rose slightly), leading to a 0.3% decline in the All-items index. The greatest downward impact came from the Transportation index, and was due to lower prices for gasoline and decreased charges relating to the purchase and the rental of automotive vehicles. Lower prices for clothing and a decline in the Food index (the latter due mainly to lower prices for fresh produce) also exerted considerable downward pressure. The Housing index rose slightly, as increased charges for fuel oil, piped gas and owned accommodation were only partly offset by lower prices for household furnishings and equipment and by decreased charges for traveller accommodation. Since December 1990, the All-items index has risen 5.5%.

Ottawa

Lower overall food prices, most notably for fresh produce, soft drinks, cereal and bakery products, and beef, explained a large part of the 0.3% fall in the All-items index. Lower prices for clothing, automotive vehicles and personal care supplies also exerted a notable downward influence. The Housing index remained unchanged, as decreased charges for traveller and owned accommodation were offset by higher prices for furniture and by increased charges for piped gas. The overall decline was partially slowed by an advance in charges relating to recreation, reading and education. Since December 1990, the All-items index has risen 4.0%.

Toronto

The All-items index fell 0.5%. Lower prices for food, notably for fresh fruit, cured and prepared meats, beef and pork, had a considerable downward impact. Decreased transportation charges were also registered, particularly for vehicle purchases, gasoline and vehicle rentals. Further downward pressure was exerted by decreased charges for traveller and owned accommodation and by lower prices for household equipment and clothing. Since December 1990, the All-items index has risen 2.8%.

Thunder Bay

The 0.5% fall in the All-items index reflected declines in the Clothing, Food, Housing and Transportation indexes. The fall in the Food index was largely due to lower prices for poultry, fresh vegetables, cured and prepared meats, bakery products and soft drinks.

Within Housing, decreased charges for owned and traveller accommodation were noted, along with lower prices for textiles and household equipment. The decline in the Transportation index resulted from lower prices for automotive vehicles and gasoline. Since December 1990, the All-items index has risen 3.8%.

Winnipeg

Declines in the Transportation, Clothing and Housing indexes accounted for most of the 0.5% fall in the All-items index. Within Transportation, lower prices were recorded for gasoline and automotive vehicles. Lower prices for men's and women's wear caused the Clothing index to decline, while decreased charges for traveller accommodation and lower prices for household furnishings caused the fall in the Housing index. Decreased prices for fresh vegetables and soft drinks caused the Food index to fall slightly. Since December 1990, the All-items index has risen 3.3%.

Regina

Lower prices for clothing, automotive vehicles, gasoline and traveller accommodation were among the main contributors to the 0.2% fall in the All-items index. The Food index also fell overall, as lower prices for fresh produce and dairy products more than offset higher prices for beef, restaurant meals, chicken and pork. The overall decline was partially offset by increased charges for rented and owned accommodation, higher prices for furniture and personal care supplies, and by increased charges for alcoholic beverages purchased from stores. Since December 1990, the All-items index has risen 3.0%.

Saskatoon

The All-items index fell 0.6%. A large part of the downward impact came from the Transportation index, where lower prices were recorded for gasoline and automotive vehicles. Lower prices for men's and women's wear and decreased prices for fresh produce also had a notable dampening effect. Further downward pressure resulted from declines in charges for household furnishings, traveller accommodation, and household equipment. Partly offsetting these declines were increased charges for rented and owned accommodation and higher prices for alcoholic beverages. Since December 1990, the All-items index has risen 2.3%.

Edmonton

The All-items index fell 0.5%. Lower prices for automotive vehicles and gasoline, and decreased charges for vehicle rentals were among the main contributors. Lower prices for clothing, fresh vegetables, soft drinks and dairy products also had a notable downward influence. A decline in the Housing index was recorded, reflecting lower prices for traveller accommodation, and, to a lesser extent, decreased charges for household equipment, household textiles and owned accommodation. Lower prices for personal care supplies and non-prescribed medicines were also noted. Since December 1990, the all-items index has risen 3.4%.

Calgary

Declines in five of the seven major components explained the 0.5% fall in the All-items index. Within the Housing index, decreased charges were recorded for traveller accommodation, household furnishings and equipment, and owned accommodation. Lower prices were also registered for men's and women's wear, fresh produce and soft drinks. The Transportation index fell overall, reflecting declines in charges relating to the purchase and rental of automotive vehicles. Prices for personal care supplies also fell. Since December 1990, the All-items index has risen 3.7%.

Vancouver

The 0.5% fall in the All-items index was largely due to a decline in the Transportation index. Lower prices for gasoline, decreased vehicle rental charges, and lower prices for automotive vehicles explained the drop in Transportation. The Food index also recorded a decrease, mainly due to lower prices for fresh produce, and to a lesser extent, soft drinks, poultry, bakery products and pork. The Housing index fell slightly, reflecting decreased charges for traveller accommodation. Since December 1990, the All-items index has risen 3.6%.

Victoria

The All-items index fell 0.5%. Lower transportation costs, most notably for vehicle rentals, gasoline and automotive vehicles, had a considerable downward impact. Decreased charges for traveller and owned accommodation and lower food prices also

contributed to the overall decline. Within Food, most of the decrease was due to lower prices for fresh produce and, to a lesser extent, poultry, bakery products and soft drinks. Declines in recreational expenses were also registered. Since December 1990, the All-items index has risen 3.6%.

Available on CANSIM: matrices 2201-2230.

Order the December 1991 issue of *Consumer Price Index* (62-001, \$9.30/\$93). For more detailed information on this release, contact Sandra Shadlock (613-951-9606), Prices Division.

Consumer Price Indexes for Urban Centres

The indexes in this table measure within each city the percentage change in consumer prices from the base period to subsequent time periods. They cannot be used to compare levels of prices between cities.¹

	All-items	Food	Housing	Clothing	Transportation	Health and Personal care	Recreation Reading and Education	Tobacco Products and Alcoholic Beverages
St. John's								
December 1991 index	120.0	111.7	117.2	126.3	116.4	125.4	128.9	140.0
% change from November 1991	-0.7	-2.4	-0.5	0.2	-0.4	-0.2	-0.4	0.0
% change from December 1990	3.0	-1.2	2.7	8.0	-1.9	6.2	4.9	13.9
Charlottetown/Summerside								
December 1991 index	125.8	122.0	119.9	122.1	117.3	132.7	129.6	186.5
% change from November 1991	-0.8	-2.1	0.0	-2.2	-0.8	-0.7	-0.5	0.0
% change from December 1990	4.7	2.2	3.5	8.4	0.3	6.8	4.1	23.0
Halifax								
December 1991 index	125.2	126.7	119.2	125.3	117.3	127.1	126.8	171.7
% change from November 1991	-0.6	-1.2	-0.6	-1.4	-0.7	-0.6	0.6	0.1
% change from December 1990	3.0	2.1	1.9	9.0	-1.9	3.5	4.5	13.6
Saint John								
December 1991 index	124.8	121.7	119.8	125.6	119.1	126.6	125.0	182.1
% change from November 1991	-0.4	-0.7	-0.1	-1.4	-0.5	0.0	-0.6	0.0
% change from December 1990	4.2	1.9	2.9	9.1	0.8	5.1	3.1	21.8
Quebec City								
December 1991 index	125.4	115.8	125.7	131.9	112.7	130.0	134.6	161.6
% change from November 1991	-0.7	-1.5	0.1	-1.1	-1.7	0.2	-0.7	-0.3
% change from December 1990	4.9	1.7	4.0	15.0	-2.5	6.6	9.1	17.8
Montreal								
December 1991 index	127.5	118.1	128.4	131.8	115.5	129.8	138.2	165.1
% change from November 1991	-0.3	-0.3	0.1	-1.1	-0.9	-0.2	-0.4	-0.1
% change from December 1990	5.5	1.4	4.5	14.8	-1.1	7.1	9.4	20.5
Ottawa								
December 1991 index	126.3	118.0	124.8	126.6	121.9	132.7	132.5	162.3
% change from November 1991	-0.3	-1.7	0.0	-0.9	-0.2	-1.3	1.1	0.1
% change from December 1990	4.0	3.5	3.4	6.7	-0.7	3.2	5.7	17.0
Toronto								
December 1991 index	128.6	120.0	129.8	126.1	122.1	133.6	133.6	161.6
% change from November 1991	-0.5	-1.1	-0.3	-1.1	-0.7	0.6	-0.1	0.1
% change from December 1990	2.8	1.4	2.4	4.6	-2.0	5.9	5.5	17.4
Thunder Bay								
December 1991 index	125.0	116.1	122.3	125.6	121.8	124.9	130.4	170.4
% change from November 1991	-0.5	-0.9	-0.3	-1.5	-0.4	0.2	-0.1	0.0
% change from December 1990	3.8	2.2	4.4	5.5	-2.6	4.5	5.1	20.3

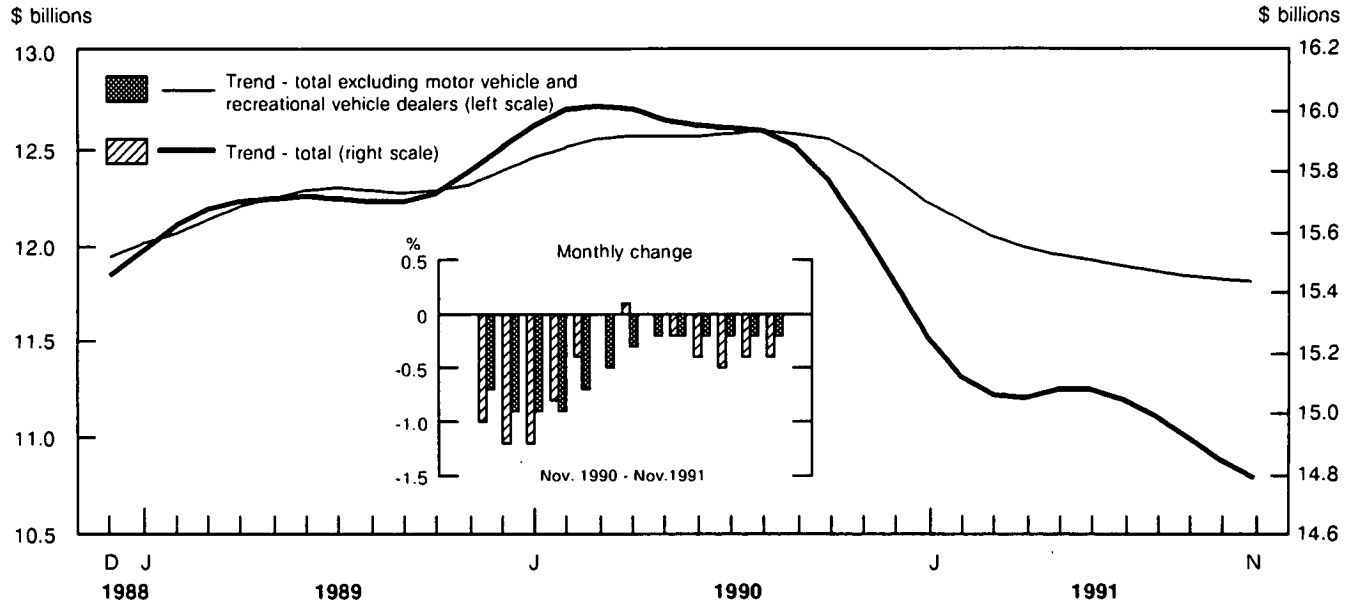
Consumer Price Indexes for Urban Centres - Concluded

The indexes in this table measure within each city the percentage change in consumer prices from the base period to subsequent time periods. They cannot be used to compare levels of prices between cities.¹

	All-items	Food	Housing	Clothing	Transportation	Health and Personal care	Recreation Reading and Education	Tobacco Products and Alcoholic Beverages
Winnipeg								
December 1991 index	125.7	122.2	123.0	125.4	120.6	127.4	131.3	161.6
% change from November 1991	-0.5	-0.2	-0.3	-1.7	-0.9	0.2	0.0	0.0
% change from December 1990	3.3	3.1	4.3	5.2	-3.5	4.0	4.8	13.0
Regina								
December 1991 index	124.9	124.1	117.4	125.3	124.2	139.0	129.4	159.7
% change from November 1991	-0.2	-0.4	0.1	-1.5	-0.9	0.5	0.2	0.6
% change from December 1990	3.0	2.6	2.7	6.8	-3.4	4.0	6.2	14.7
Saskatoon								
December 1991 index	124.4	124.0	118.2	124.5	120.2	149.5	127.2	149.9
% change from November 1991	-0.6	-0.6	-0.3	-1.4	-1.4	0.5	-0.6	0.6
% change from December 1990	2.3	3.1	2.2	7.0	-5.4	3.2	4.8	11.6
Edmonton								
December 1991 index	124.6	117.3	121.5	125.1	118.6	126.1	130.9	177.4
% change from November 1991	-0.5	-0.4	-0.2	-1.3	-0.8	-1.3	0.1	0.1
% change from December 1990	3.4	2.8	3.8	7.7	-3.0	4.4	5.2	17.1
Calgary								
December 1991 index	125.0	119.4	121.0	126.1	117.7	124.0	130.2	177.0
% change from November 1991	-0.5	-0.7	-0.5	-1.5	-0.4	-1.1	0.2	0.0
% change from December 1990	3.7	4.2	3.3	7.3	-2.6	3.1	5.5	17.0
Vancouver								
December 1991 index	124.0	122.7	119.2	123.0	122.9	123.0	129.3	155.2
% change from November 1991	-0.5	-0.6	-0.1	0.3	-2.2	0.2	0.2	-0.1
% change from December 1990	3.6	5.1	2.3	8.1	-2.6	6.3	5.9	14.5
Victoria								
December 1991 index	123.9	122.4	117.8	124.0	124.3	121.7	130.0	156.5
% change from November 1991	-0.5	-0.6	-0.3	0.5	-1.2	0.3	-0.7	0.3
% change from December 1990	3.6	4.8	2.3	9.1	-1.9	3.8	4.8	14.5

¹ For inter city indexes of retail price differentials, refer to Table 23 of the July-September 1991 issue of Consumer Prices and Price Indexes (62-010, \$18/\$72).

Retail Sales - Canada Trends¹



¹ Trends represent weighted averages of data.

Retail Trade

November 1991

Highlights

Seasonally Adjusted Sales in Current Dollars

- Preliminary estimates indicate that retail sales rose 0.7% in November to \$14.8 billion, partly offsetting the 1.7% decrease in October. Excluding motor vehicle and recreational vehicle dealers, retail sales decreased a modest 0.2% in November, a slower rate of decline than the 0.4% registered in October and the 0.5% in September.
- In the last four months, retail sales have fluctuated markedly, primarily due to the volatile sales of motor vehicle and recreational vehicle dealers. The 4.1% gain in sales posted by motor vehicle and recreational vehicle dealers in November followed a drop of 6.7% in October and an increase of 4.3% in September.
- Excluding motor vehicle and recreational vehicle dealers, retail sales have shown a mildly declining trend since March 1991. The most significant sales decreases, in order of dollar impact, were reported by gasoline service stations (-3.5%), automotive parts, accessories and services (-1.8%), and supermarkets and grocery stores (-0.3%). Partly offsetting these declines were gains by drug and patent medicine stores (+3.3%) and general merchandise stores (+1.0%).
- The decrease reported by gasoline service stations was the fourth consecutive monthly decline. Sales of automotive parts, accessories and services fell in November, following an increase of 1.8% in October and a decrease of 0.8% in September. The drop in sales for supermarkets and grocery stores was similar to the previous month (-0.3%). Drug and patent medicine store sales advanced for the fourth consecutive month. The gain in general merchandise stores followed no growth in October and a 2.7% decline in September.

- All provinces except British Columbia (-0.7%) registered higher sales in November, ranging from +3.0% in Newfoundland to +0.5% in Ontario. Sales advanced in the Northwest Territories (3.3%) and the Yukon (3.0%).

Trends

- As illustrated in the chart, after declining sharply from April 1990 to March 1991 and rising slightly between April and June, the trend for total retail trade has been decreasing. Retail sales excluding recreational and motor vehicle dealers also have a declining trend, but at a slower rate.

Year-to-date

- Cumulative retail sales in current dollars for the first 11 months amounted to \$161.5 billion, down 2.2% from the corresponding period in 1990 (after removing federal sales tax from the 1990 data). The rate of decline has remained constant throughout the last five months.

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.

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

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

For more detailed information on this release, contact Maurice Massaad (613-951-9682) or Sonia Demers (613-951-3551), Retail Trade Section, Industry Division. □

Retail Sales, by Trade Group and by Region

November 1991

Trade group	Unadjusted				Seasonally Adjusted						
	Nov. 1990	Oct. 1991 ^r	Nov. 1991 ^p	Nov.* 1991/ 1990	Nov. 1990	Aug. 1991 ^r	Sept. 1991 ^r	Oct. 1991 ^r	Nov. 1991 ^p	Nov. / Oct. 1991	Nov. 1991/ 1990*
	millions of \$				millions of \$						
				%						%	%
Canada											
Supermarkets and grocery stores	3,628	3,591	3,647	0.5	3,564	3,575	3,583	3,574	3,565	-0.3	--
All other food stores	311	286	282	-9.3	317	298	297	291	294	1.1	-7.4
Drug and patent medicine stores	763	785	788	3.3	752	746	754	764	789	3.3	4.9
Shoe stores	178	134	149	-16.1	144	129	129	121	121	-0.7	-16.5
Men's clothing stores	227	140	179	-21.3	166	147	140	130	130	-0.4	-21.8
Women's clothing stores	348	309	339	-2.4	316	301	304	298	304	2.1	-3.6
Other clothing stores	403	327	370	-8.2	334	310	312	306	306	0.2	-8.2
Household furniture and appliance stores	783	634	704	-10.0	687	631	615	599	611	1.9	-11.1
Household furnishings stores	230	201	202	-12.2	200	178	180	183	176	-4.0	-12.0
Motor vehicle and recreational vehicle dealers	3,052	3,024	2,847	-6.7	3,208	3,007	3,136	2,927	3,046	4.1	-5.0
Gasoline service stations	1,379	1,180	1,095	-20.6	1,366	1,172	1,150	1,135	1,096	-3.5	-19.8
Automotive parts, accessories and services	1,138	941	965	-15.2	1,026	879	872	888	872	-1.8	-15.0
General merchandise stores	2,296	1,811	2,234	-2.7	1,788	1,767	1,719	1,719	1,737	1.0	-2.8
Other semi-durable goods stores	593	475	524	-11.6	560	503	502	495	498	0.6	-11.1
Other durable goods stores	474	379	427	-10.0	446	408	424	407	400	-1.8	-10.4
All other retail stores	899	835	902	0.4	875	854	850	873	867	-0.7	-0.9
Total, all stores	16,703	15,053	15,657	-6.3	15,748	14,903	14,967	14,712	14,811	0.7	-6.0
Total excluding motor vehicle and recreational vehicle dealers	13,651	12,029	12,810	-6.2	12,540	11,896	11,831	11,785	11,765	-0.2	-6.2
Department store type merchandise	6,295	5,196	5,918	-6.0	5,392	5,119	5,079	5,023	5,071	1.0	-5.9
Regions											
Newfoundland	324	281	316	-2.2	302	290	288	283	291	3.0	-3.5
Prince Edward Island	70	58	63	-10.1	68	61	60	59	60	2.5	-12.1
Nova Scotia	557	484	520	-6.6	515	480	485	478	482	0.9	-6.4
New Brunswick	450	383	408	-9.3	418	390	380	376	380	1.0	-9.1
Quebec	4,067	3,746	3,754	-7.7	3,925	3,682	3,669	3,614	3,650	1.0	-7.0
Ontario	6,274	5,536	5,880	-6.3	5,815	5,466	5,533	5,398	5,423	0.5	-6.8
Manitoba	587	516	550	-6.4	545	509	510	500	512	2.4	-6.2
Saskatchewan	508	443	469	-7.8	473	433	447	422	430	1.9	-9.0
Alberta	1,729	1,575	1,627	-5.9	1,631	1,574	1,612	1,519	1,548	1.9	-5.1
British Columbia	2,086	1,986	2,022	-3.1	2,008	1,972	2,031	1,967	1,952	-0.7	-2.8
Yukon	16	15	15	-6.4	16	15	14	14	15	3.0	-6.3
Northwest Territories	34	30	33	-4.7	33	30	29	30	31	3.3	-7.4

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

^p Preliminary.

^r Revised.

-- Amount too small to be expressed.

Sales of Natural Gas

(Preliminary Data)
November 1991

Sales of natural gas (including direct sales) in Canada during November 1991 totalled 5 504 million cubic metres, a 6.2% increase over November 1990.

On the basis of rate structure information, sales in November 1991 were as follows, with the percentage changes from November 1990 in brackets: residential sales, 1 459 million cubic metres (+5.3%); commercial sales, 1 198 million cubic metres (+4.2%); and industrial sales (including direct sales), 2 847 million cubic metres (+7.6%).

Year-to-date figures for 1991 indicate that sales of natural gas amounted to 48 646 million cubic metres, a 1.0% increase over the level recorded during the same period in 1990.

On the basis of rate structure information, year-to-date sales were as follows, with the percentage changes from 1990 in brackets: residential sales, 11 762 million cubic metres (+1.9); commercial sales, 9 784 million cubic metres (+2.0%); and industrial sales (including direct sales), 27 100 million cubic metres (+0.3%).

Based on the sum of the latest 12 months (December 1990 to November 1991), total natural gas sales (including direct sales) posted a 0.5% increase over the previous period (December 1989 to November 1990).

The November 1991 issue of *Gas Utilities* (55-002, \$12.70/\$127) will be available the third week of February. See "How to Order Publications".

For more detailed information on this release, contact Gary Smalldridge (613-951-3567), Energy Section, Industry Division.

Sales of Natural Gas - Preliminary Data

November 1991

	Rate structure				Total
	Residential	Commercial	Industrial	Direct	
	(thousands of cubic metres)				
New Brunswick	-	-	-	-	-
Quebec	47 968	123 162	316 766	2 853	490 749
Ontario	621 612	434 073	785 793	175 511	2 016 989
Manitoba	93 419	88 419	33 979	575	216 392
Saskatchewan	112 221	66 079	6 272	160 331	344 903
Alberta	410 018	323 496	1 092 754	-	1 826 268
British Columbia	173 918	162 353	131 685	140 383	608 339
November 1991 - Canada	1 459 156	1 197 582	2 367 249	479 653	5 503 640
November 1990 - Canada	1 385 297	1 149 820	2 311 016	335 952	5 182 085
% change	5.3	4.2	7.6		6.2
Year-to-date - Canada 1991	11 762 234	9 783 701	22 809 493	4 290 843	48 646 271
Year-to-date - Canada 1990	11 543 423	9 596 218	23 419 847	3 591 911	48 151 399
% change	1.9	2.0	0.3		1.0
Sum of December 1990 - November 1991	13 734 152	11 388 066	25 173 545	4 670 891	54 966 654
Sum of December 1989 - November 1990	13 601 820	11 194 484	25 906 848	4 005 610	54 708 762
% change	1.0	1.7	-0.2		0.5

Note: Revised figures will be available in the "Gas Utilities" publication (Catalogue #55-002) as well as on CANSIM.
- Nil or zero.

DATA AVAILABILITY ANNOUNCEMENT

Canadian Civil Aviation Statistics

November 1991

Preliminary monthly operational data for November 1991 is now available. Data reported by Canadian Level I air carriers on scheduled services show that domestic passenger-kilometres decreased by 3.7% from November 1990, while international passenger-kilometres decreased by 10.1%.

Available now on CANSIM: matrix 385.

Preliminary civil aviation data for November 1991 will be published in the February issue of *Aviation Statistics Centre Service Bulletin* (51-004, \$9.30/\$93). See "How to Order Publications".

For more information on this release, contact Bradley Snider (819-997-6195), Aviation Statistics Centre, Transportation Division. ■

**The
Daily**

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The Daily, January 21, 1992

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