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MAJOR RELEASES

- Retail trade, 1995 and December 1995** 2
 Retail sales during the Christmas shopping season were not as good as in the same period in 1994. In fact, 1995's retail sales growth was the lowest in three years.

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MAJOR RELEASES

Retail trade

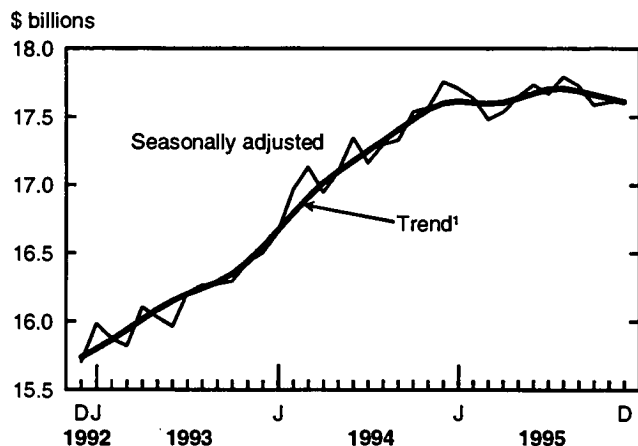
1995 (annual) and December 1995

Retail sales in December remained virtually unchanged from October and November 1995. Consumers spent \$17.6 billion in retail stores in December, a 0.1% increase from November. However, December 1995 sales were 1.0% lower than in December 1994.

While there was no overall change in December, some sectors grew while others declined. The slight monthly growth, in dollar terms, came mostly from the food sector (+1.0%), where sales increased following two consecutive monthly declines. Sales were also higher in the drug (+1.1%) and automotive (+0.1%) sectors. These latest gains were partly offset by lower sales in other sectors, mainly in the other retail (-2.0%) and clothing (-1.1%) sectors.

Eight provinces posted monthly sales increases. The largest increases in dollar terms were recorded in Ontario (+0.3%) and Nova Scotia (+2.2%). Quebec (-0.4%) and Alberta (-0.6%) posted the largest declines. Quebec's decline followed five consecutive monthly increases.

Retail sales recorded their lowest growth in three years



¹ The trend represents smoothed seasonally adjusted data.

Annual 1995 (based on unadjusted data)

Retail sales increased 2.1% in 1995 to \$211.2 billion. Sales have risen every year since 1991, with the annual increases growing stronger each

Note to readers

At the end of every calendar year, seasonally adjusted figures are revised to equal the sum of the unadjusted estimates. Revised seasonally adjusted figures are presented this month for September to December 1995. Revisions for the complete 1995 calendar year will be calculated and released in April 1996.

year until 1995 (+2.1% in 1992, +4.8% in 1993 and +6.7% in 1994). When the effect of price changes is removed and retail sales are expressed in constant dollars, 1995 sales were 0.3% higher than 1994. As reported in the media, consumers have been cautious about spending in 1995 because of lower consumer confidence resulting from weak employment growth, high debt levels and a squeeze on incomes.

More than half of 1995's gain came from the automotive sector (which includes motor vehicle and recreational vehicle dealers, gasoline service stations, and parts, accessories and services outlets) which accounted for 35% of all retail sales. Sales in this sector advanced 3.3%, substantially lower than 1994's solid 10.0% increase. Motor vehicle and recreational vehicle dealers led the sector with a gain of 4.9% following a 13.8% gain in 1994. Sales by new cars dealers recorded the slowest gain in 1995; the number of new vehicles sold fell to its lowest level in 12 years. Sales by used car dealers and by recreational vehicle dealers continued to show strength.

Besides the growth in the automotive sector, sales were also higher in the general merchandise (+4.3%), clothing (+3.0%) and other retail (+2.2%) sectors. The growth in the clothing sector followed a strong 7.1% gain in 1994. Consumers bought more of their clothes in unisex and family clothing stores and in department stores. Other clothing store retailers (+9.1%) contributed the most to the overall 1995 gain. Purchases in women's clothing stores grew 1.8%, whereas purchases in men's clothing stores fell 6.4%, a second consecutive annual decline.

After good performances in 1992 and 1993 (+9.5% and +10.9% respectively), sales by drug stores slowed in 1994 (+1.2%) and fell in 1995 (-1.6%). Factors affecting the sector's slowdown in these last two years included provincial legislation that prohibits drug stores from selling tobacco products and fierce competition from discount stores and supermarkets for sales of various pharmaceutical products. Also, mail order purchases of pharmaceutical products became more popular in 1995.

Similarly, after three consecutive annual increases, sales in the furniture sector dropped 0.9% in 1995. This reflects the housing market's dismal performance in 1995.

Retail sales, by sector

	1992	1993	1994	1995	1994 to 1995 % change
	\$ millions				
Food	48,556	51,082	53,495	53,882	0.72
Drug	10,722	11,889	12,036	11,850	-1.55
Clothing	10,749	11,436	12,246	12,616	3.02
Furniture	9,832	10,633	10,960	10,860	-0.91
Automotive	62,957	66,482	73,158	75,534	3.25
General merchandise	20,860	20,495	21,531	22,459	4.31
Other	21,373	21,799	23,437	23,955	2.21
Total, all stores	185,049	193,815	206,861	211,157	2.08

Western provinces posted the strongest growth

In 1995, the western provinces posted the strongest growth in retail sales for the third year in a row. Sales rose 3.7% in 1995, surpassing the national average of 2.1%. The advance in 1995 followed increases in the western provinces of 8.4% and 6.2% in 1994 and 1993 respectively. The strength in the West came from British Columbia, Manitoba and Saskatchewan. Alberta showed only a small increase of 1.1% over 1994.

Retailers in British Columbia reported the strongest sales growth (+5.2%), as they benefitted from higher sales by the automotive, general merchandise, and clothing sectors. In the automotive sector, sales by motor vehicles and recreational vehicle dealers dominated the gain with an increase of 10.7% in 1995 after a strong 21.1% gain in 1994.

Manitoba recorded growth of 4.9% in 1995 as retailers in the automotive (+9.1%) and other retail sectors (+6.2%) had a good year. Only the clothing sector reported a decline (-1.1%). Manitoba and Prince Edward Island were the only two provinces to report a higher rate of growth than in 1994. All other provinces recorded growth below the very good rates of 1994.

In the Atlantic provinces, sales advanced 0.9% in 1995 after a 1.1% gain in 1994. Prince Edward Island had the strongest sales growth east of Quebec. New Brunswick and Newfoundland also contributed to the overall gain. For the first time since 1991, retailers in Nova Scotia were hit hard as sales declined 1.6%. The drop was due entirely to sales declines in the furniture and automotive sectors. Sales by motor vehicle and recreational vehicle dealers were down 3.6% in 1995.

Nova Scotia and Quebec were the only provinces reporting a decline in sales by motor vehicle and recreational vehicle dealers.

Quebec retailers recorded lower sales (-1.1%) in 1995. This followed three years of increases in retail sales. The food, drug, and automotive sectors were the biggest sources of the decline in 1995. Sales in the food sector, which represented one-third of total sales, declined 5.1%. This reflects a consumer shift towards stores classified outside the food sector that also sell food. This shift mostly affected independent grocers, some of whom closed stores or went bankrupt in 1995. In Quebec, the market share held by independent food stores is twice that of any other province in Canada.

Retail sales, by province and territory

	1992	1993	1994	1995	1994 to 1995 % change
	\$ millions				
Newfoundland	3,359	3,328	3,409	3,462	1.55
Prince Edward Island	798	846	868	919	5.88
Nova Scotia	6,110	6,372	6,464	6,364	-1.55
New Brunswick	4,763	4,962	4,932	5,074	2.88
Quebec	45,078	47,299	50,364	49,789	-1.14
Ontario	68,704	71,290	76,044	78,358	3.04
Manitoba	6,393	6,666	6,949	7,289	4.89
Saskatchewan	5,379	5,740	6,267	6,564	4.74
Alberta	19,440	20,351	21,855	22,087	1.06
British Columbia	24,433	26,348	29,032	30,532	5.17
Yukon	199	205	212	223	5.19
Northwest Territories	391	412	467	497	6.42

Early indications of January sales

Estimates indicate a drop in the number of new motor vehicles sold. On the other hand, employment in trade showed a slight increase (+0.2%) in January 1996. Data on the retail sale trade in the United States are not yet available.

Available on CANSIM: matrices 2299, 2398-2417 and 2420.

The December 1995 issue of *Retail trade* (63-005, \$20/\$200), will be available soon. See "How to order publications".

For further information on this release, contact Pierre Desjardins (613-951-9682), Retail Trade Section, Industry Division. □

Retail sales

	Dec. 1994	Sept. 1995 ^r	Oct. 1995 ^r	Nov. 1995 ^r	Dec. 1995 ^p	Nov. 1995 to Dec. 1995	Dec. 1994 to Dec. 1995
seasonally adjusted							
	\$ millions					% change	
Food	4,556	4,496	4,468	4,442	4,485	1.0	-1.6
Supermarkets and grocery stores	4,216	4,147	4,124	4,102	4,140	0.9	-1.8
All other food stores	340	349	344	341	344	1.1	1.4
Drug and patent medicine stores	993	995	993	1,002	1,013	1.1	2.0
Clothing	1,078	1,039	1,012	1,022	1,011	-1.1	-6.3
Shoe stores	149	144	132	143	135	-5.4	-9.2
Men's clothing stores	137	129	128	124	124	0.3	-9.3
Women's clothing stores	359	334	326	323	323	0.1	-10.0
Other clothing stores	433	432	425	432	428	-1.1	-1.3
Furniture	974	893	882	875	877	0.3	-9.9
Household furniture and appliance stores	782	706	695	685	687	0.3	-12.2
Household furnishings stores	191	187	187	190	190	0.2	-0.7
Automotive	6,341	6,391	6,339	6,366	6,373	0.1	0.5
Motor vehicle and recreational vehicle dealers	4,139	4,201	4,172	4,153	4,144	-0.2	0.1
Gasoline service stations	1,184	1,235	1,229	1,227	1,268	3.3	7.1
Automotive parts, accessories and services	1,018	955	937	986	961	-2.5	-5.6
General merchandise stores	1,837	1,872	1,885	1,877	1,881	0.2	2.4
Retail stores not elsewhere classified	1,986	2,007	1,973	1,989	1,950	-2.0	-1.8
Other semi-durable goods stores	598	607	575	569	572	0.5	-4.3
Other durable goods stores	468	445	444	445	441	-0.8	-5.8
All other retail stores not elsewhere classified	920	955	954	975	936	-4.0	1.8
Total, retail sales	17,765	17,693	17,552	17,573	17,590	0.1	-1.0
Total excluding motor vehicle and recreational vehicle dealers	13,626	13,492	13,380	13,420	13,445	0.2	-1.3
Department store type merchandise	5,949	5,851	5,791	5,790	5,795	0.1	-2.6
Newfoundland	286	289	287	285	280	-1.8	-2.2
Prince Edward Island	73	78	78	80	79	-0.6	8.8
Nova Scotia	545	524	517	520	531	2.2	-2.5
New Brunswick	420	434	427	433	434	0.1	3.3
Quebec	4,262	4,186	4,198	4,228	4,211	-0.4	-1.2
Ontario	6,609	6,580	6,423	6,425	6,446	0.3	-2.5
Manitoba	595	620	612	600	605	0.8	1.7
Saskatchewan	532	557	561	555	556	0.2	4.5
Alberta	1,854	1,839	1,869	1,859	1,849	-0.6	-0.3
British Columbia	2,530	2,526	2,518	2,529	2,537	0.3	0.3
Yukon	18	19	19	19	19	2.0	6.0
Northwest Territories	40	42	42	40	42	4.9	3.9

^p Preliminary figures.

^r Revised figures.

Retail sales

	Dec. 1994	Nov. 1995 ^r	Dec. 1995 ^p	Dec. 1994 to Dec. 1995
	unadjusted			
	\$ millions			% change
Food	5,133	4,336	4,949	-3.6
Supermarkets and grocery stores	4,722	4,017	4,529	-4.1
All other food stores	411	319	420	2.3
Drug and patent medicine stores	1,248	1,012	1,250	0.1
Clothing	1,852	1,180	1,733	-6.4
Shoe stores	210	169	183	-13.0
Men's clothing stores	298	152	265	-11.3
Women's clothing stores	601	349	545	-9.3
Other clothing stores	743	510	741	-0.2
Furniture	1,382	973	1,222	-11.6
Household furniture and appliance stores	1,145	760	989	-13.6
Household furnishings stores	237	213	233	-1.9
Automotive	5,729	6,249	5,649	-1.4
Motor vehicle and recreational vehicle dealers	3,412	3,918	3,346	-1.9
Gasoline service stations	1,182	1,229	1,254	6.0
Automotive parts, accessories and services	1,135	1,103	1,049	-7.5
General merchandise stores	3,211	2,367	3,260	1.5
Retail stores not elsewhere classified	3,331	2,042	3,194	-4.1
Other semi-durable goods stores	961	608	899	-6.5
Other durable goods stores	924	461	860	-7.0
All other retail stores not elsewhere classified	1,446	973	1,435	-0.7
Total, retail sales	21,886	18,159	21,257	-2.9
Total excluding motor vehicle and recreational vehicle dealers	18,475	14,242	17,911	-3.1
Department store type merchandise	9,579	6,602	9,224	-3.7
Newfoundland	369	306	352	-4.7
Prince Edward Island	89	82	94	5.6
Nova Scotia	693	544	663	-4.3
New Brunswick	517	460	520	0.5
Quebec	4,961	4,303	4,778	-3.7
Ontario	8,347	6,772	7,991	-4.3
Manitoba	761	625	757	-0.5
Saskatchewan	662	581	678	2.4
Alberta	2,313	1,904	2,269	-1.9
British Columbia	3,106	2,523	3,084	-0.7
Yukon	20	18	21	4.4
Northwest Territories	49	41	50	3.1

^r Revised figures.

^p Preliminary figures.

OTHER RELEASES

Urban transit

Second quarter 1995

In the second quarter of 1995, 96 transit companies carried over 347 million passengers and generated operating revenue of \$382 million.

Complete results of the second quarter Passenger Bus and Urban Transit Survey are now available and will be in the Vol. 12, no. 3 *Surface and marine transport service bulletin* (50-002, \$11/\$80). See "How to order publications".

For further information on this release, contact Larry McKeown at (613) 951-6153, Transportation Division. Internet: mckeown@statcan.ca. ■

Stocks of frozen poultry meat

February 1, 1996

Preliminary data for February 1, 1996 stocks of frozen poultry meat in cold storage are now available.

Available on CANSIM: matrices 5675-5677.

For further information on this release, contact Conrad Ogrodnik (613-951-2860), Livestock and Animal Products Section, Agriculture Division. ■

Value of shipments

	1993	1994	1993 to 1994	Catalogue	Contact	Phone (613)
	\$ millions		% change			
Industry (SIC)						
Wooden kitchen and bathroom vanity (2542)	862.2	937.1	8.7	35-250-XPB	B. Pépin	951-3516
Wooden door and window (2543)	1,067.4	1,173.0	9.9	35-250-XPB	B. Pépin	951-3516
Other millwork (2549)	984.9	1,127.6	14.5	35-250-XPB	B. Pépin	951-3516
Folding carton and set-up box (2731)	990.3	1,099.1	11.0	36-250-XPB	B. Pépin	951-3516
Power boiler and heat exchanger (3011)	786.4	986.2	25.4	41-251-XPB	D. Higgins	951-9837
Metal closure and container (3042)	1,278.0	1,373.6	7.5	41-251-XPB	D. Higgins	951-9837
Heating equipment (3071)	502.1	599.2	19.3	41-251-XPB	D. Higgins	951-9837
Electrical transformer (3371)	618.6	607.4	-1.8	43-250-XPB	L. Vincent	951-3523
Paint and varnish (3751)	1,482.6	1,610.0	8.6	46-250-XPB	B. Meyer	951-3528

Annual survey of manufactures

1994

The Annual Survey of Manufactures provides information on over 200 different industries. Principal statistics for each industry will be released as they become available. Data for the industries listed in the table below are now available.

Available on CANSIM: matrices 5464, 5465, 5466, 5489, 5516, 5525, 5535, 5580 and 6877.

Data for these industries listed in the table will appear in *Wood industries* (35-250-XPB, \$53), *Paper and allied products industries* (36-250-XPB, \$38), *Fabricated metal products industries* (41-251-XPB, \$38), *Electrical and electronic products industries* (43-250-XPB, \$38) and *Chemical and chemical products industries* (46-250-XPB, \$38). The publications will be released at a later date. See "How to order publications".

PUBLICATIONS RELEASED

The Input-Output structure of the Canadian economy, 1992

Catalogue number 15-201-XPB

(Canada: \$66; United States: US\$80; other countries: US\$93).

Canada's mineral production, preliminary estimates, 1995

Catalogue number 26-202-XPB

(Canada: \$22; United States: US\$26; other countries: US\$31).

Monthly survey of manufacturing, December 1995

Catalogue number 31-001-XPB

(Canada: \$19/\$190; United States: US\$23/US\$228; other countries: US\$27/US\$266).

Production and stocks of tea, coffee and cocoa, Quarter ended December 1995

Catalogue number 32-025-XPB

(Canada: \$10/\$32; United States: US\$12/US\$39; other countries: US\$14/US\$45).

Refined petroleum products, November 1995

Catalogue number 45-004-XPB

(Canada: \$20/\$200; United States: US\$24/US\$240; other countries: US\$28/US\$280).

Shipments of plastic film and bags manufactured from resin, Quarter ended December 31, 1995

Catalogue number 47-007-XPB

(Canada: \$10/\$32; United States: US\$12/US\$39; other countries: US\$14/US\$45).

Hospital statistics: preliminary annual report, 1993-94, microfiche version

Catalogue number 83-241-XMB

(Canada: \$25; United States: US\$30; other countries: US\$35).

Hospital statistics: preliminary annual report, 1993-94, paper version

Catalogue number 83-241-XPB

(Canada: \$30; United States: US\$36; other countries: US\$42).

Births and deaths, 1993, microfiche version

Catalogue number 84-210-XMB

(Canada: \$25; United States: US\$30; other countries: US\$35).

Births and deaths, 1993, paper version

Catalogue number 84-210-XPB

(Canada: \$35; United States: US\$42; other countries: US\$49).

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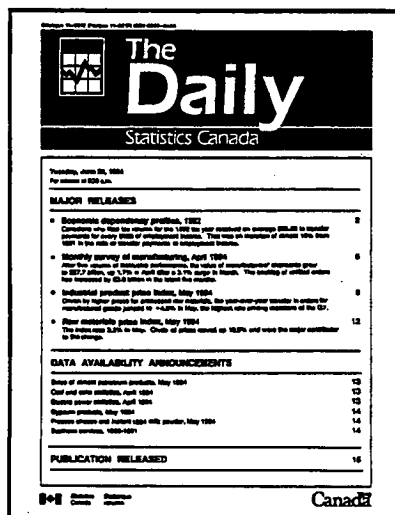
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