

The Daily

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Retail sales were down 2.4% in November compared with a month earlier, largely reflecting the sizeable drop in gasoline prices and lower sales at new car dealers. Excluding the automotive sector, retail sales were flat. In volume terms, retail sales fell 0.6%.	
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Releases

Retail trade

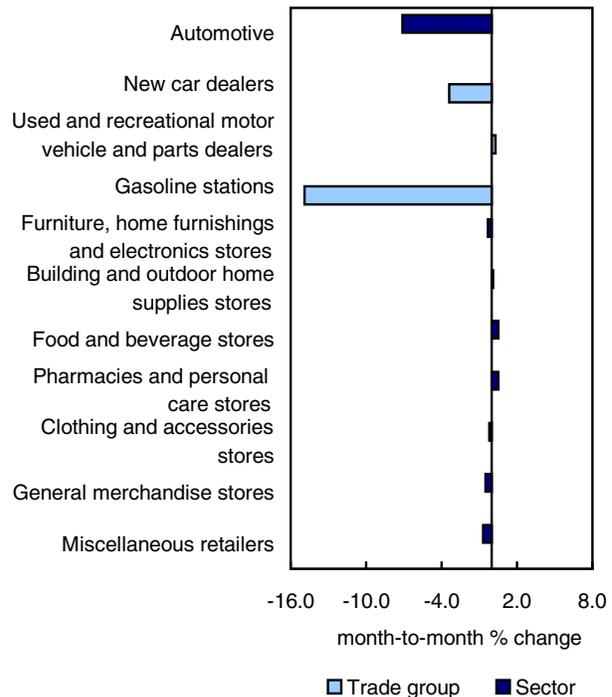
November 2008

In November, retail sales fell by 2.4% from October to \$34.9 billion, the largest monthly decline since January 1998. November's decline largely reflected price-induced lower sales at gasoline stations and a drop in unit sales at new car dealers. Excluding the automotive sector (which includes new, used and recreational vehicle and parts dealers as well as gasoline stations), retail sales were flat.

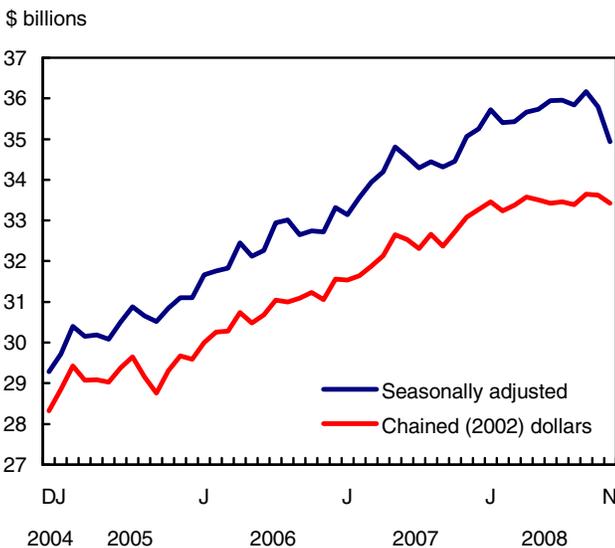
Note to readers

Total retail sales by volume are measured by deflating values in current dollars of the various trade groups using consumer price indexes. This retail sales in chained dollars series (2002) is a chain Fisher volume index with 2002 as the reference year.

Excluding the automotive sector, retail sales are flat in November



Lower gasoline prices amplifies November's retail sales decline



Retail sales in November were pulled down considerably by a 7.1% decline in sales in the automotive sector. The 14.9% sales drop at gasoline stations, the largest monthly decline since September 2006, was all price-induced as gasoline prices at the pump fell considerably from October. Lower unit sales of new motor vehicles, especially passenger cars, according to the New Motor Vehicle Sales Survey, were behind the 3.4% sales decline at new car dealers in November.

Retail sales in volume terms fell 0.6%.

Aside from the automotive sector, four other retail sectors registered lower sales while the remaining three reported increases.

The second largest decline in November was observed in the miscellaneous retailers sector, where sales fell by 0.7%. Sales in this sector have levelled off in 2008, mainly reflecting a downturn in sales at sporting goods, hobby, music and book stores midway through the year.

Sales in general merchandise stores decreased by 0.5%, representing the second decline in nine months.

The largest increases were observed in the pharmacies and personal care stores sector, and the food and beverage stores sector, where sales rose by 0.5% in each sector.

Sales down in all provinces and territories

Lower gasoline prices and a decline in sales at new car dealers led to a drop in sales in all provinces in November. With the exception of Prince Edward Island and Saskatchewan, the decline in retail sales was at least 1.0%.

Retail sales in British Columbia dropped by 3.1% in November and were at their lowest level since January 2007. Sales in this province have been on a downward trend since the summer of 2008.

In Ontario, November's 2.8% sales decline was the third consecutive monthly decrease after reaching a plateau midway through 2008.

With a 2.1% decline in November, retail sales in Quebec slowed down after having increased earlier in 2008.

Saskatchewan's retail sales decline in November was the fifth in two years. As for Prince Edward Island, it was the only province to register an increase in

the number of new motor vehicles sold in November, according to the New Motor Vehicles Sales Survey.

It is now possible to consult the tables of unadjusted data by industry and by province and territory from the *Tables by subject* module of our website.

For information on related indicators, refer to the *Latest statistics* page on our website.

Available on CANSIM: tables 080-0014 to 080-0017.

Definitions, data sources and methods: survey numbers, including related surveys, 2406 and 2408.

The November 2008 issue of the publication *Retail Trade* (63-005-XWE, free) will be available shortly.

Data on retail trade for December will be released on February 23.

For more information, or to order data, contact Client Services (613-951-3549; toll-free 1-877-421-3067; retailinfo@statcan.gc.ca). For analytical information, or to enquire about the concepts, methods or data quality of this release, contact Lucy Chung (613-951-1903), Distributive Trades Division.

□

Retail sales

	November 2007	August 2008 ^r	September 2008 ^r	October 2008 ^r	November 2008 ^p	October to November 2008	November 2007 to November 2008
Seasonally adjusted							
	\$ millions					% change	
Automotive	12,130	12,238	12,443	12,204	11,338	-7.1	-6.5
New car dealers	6,298	5,943	6,097	6,059	5,853	-3.4	-7.1
Used and recreational motor vehicle and parts dealers	1,582	1,617	1,646	1,672	1,678	0.3	6.1
Gasoline stations	4,251	4,678	4,700	4,473	3,808	-14.9	-10.4
Furniture, home furnishings and electronics stores	2,506	2,659	2,639	2,555	2,548	-0.3	1.7
Furniture stores	844	874	871	826	829	0.3	-1.8
Home furnishings stores	494	521	520	503	484	-3.7	-1.9
Computer and software stores	119	119	115	117	112	-4.4	-5.5
Home electronics and appliance stores	1,050	1,144	1,132	1,109	1,123	1.3	7.0
Building and outdoor home supplies stores	2,233	2,304	2,286	2,281	2,283	0.1	2.3
Home centres and hardware stores	1,802	1,886	1,862	1,860	1,875	0.8	4.0
Specialized building materials and garden stores	431	418	424	421	408	-3.0	-5.2
Food and beverage stores	7,821	7,985	8,075	8,106	8,145	0.5	4.2
Supermarkets	5,604	5,746	5,829	5,876	5,896	0.3	5.2
Convenience and specialty food stores	839	843	840	841	850	1.2	1.3
Beer, wine and liquor stores	1,377	1,397	1,407	1,389	1,399	0.7	1.6
Pharmacies and personal care stores	2,393	2,459	2,457	2,473	2,485	0.5	3.9
Clothing and accessories stores	2,024	2,011	2,030	1,990	1,986	-0.2	-1.8
Clothing stores	1,549	1,542	1,555	1,522	1,527	0.3	-1.4
Shoe, clothing accessories and jewellery stores	475	469	475	468	460	-1.7	-3.2
General merchandise stores	4,148	4,348	4,414	4,372	4,351	-0.5	4.9
Miscellaneous retailers	1,814	1,837	1,819	1,810	1,798	-0.7	-0.9
Sporting goods, hobby, music and book stores	890	906	895	881	878	-0.3	-1.3
Miscellaneous store retailers	925	930	923	929	919	-1.0	-0.6
Total retail sales	35,068	35,841	36,163	35,791	34,936	-2.4	-0.4
Total excluding new car dealers, used and recreational motor vehicle and parts dealers	27,189	28,281	28,420	28,060	27,406	-2.3	0.8
Provinces and territories							
Newfoundland and Labrador	560	602	612	615	597	-3.0	6.5
Prince Edward Island	138	144	146	146	145	-0.2	5.1
Nova Scotia	987	1,026	1,056	1,026	996	-2.9	0.9
New Brunswick	796	830	849	835	804	-3.8	0.9
Quebec	7,700	8,001	8,192	8,037	7,865	-2.1	2.1
Ontario	12,423	12,821	12,785	12,697	12,342	-2.8	-0.7
Manitoba	1,214	1,252	1,262	1,274	1,262	-1.0	3.9
Saskatchewan	1,146	1,212	1,213	1,226	1,222	-0.4	6.6
Alberta	5,189	5,094	5,141	5,116	5,035	-1.6	-3.0
British Columbia	4,786	4,733	4,777	4,690	4,543	-3.1	-5.1
Yukon	43	44	45	45	44	-2.8	2.2
Northwest Territories	61	59	60	59	56	-4.2	-7.4
Nunavut	24	25	25	26	25	-1.7	6.3

^r revised

^p preliminary

Note: Figures may not add up to total due to rounding.

Retail sales

	November 2007	October 2008 ^r	November 2008 ^p
	Unadjusted		
	\$ millions		
Automotive	11,218	11,936	9,902
New car dealers	5,773	5,834	4,975
Used and recreational motor vehicle and parts dealers	1,404	1,638	1,442
Gasoline stations	4,041	4,465	3,485
Furniture, home furnishings and electronics stores	2,713	2,541	2,668
Furniture stores	885	863	857
Home furnishings stores	574	521	535
Computer and software stores	124	118	109
Home electronics and appliance stores	1,131	1,040	1,166
Building and outdoor home supplies stores	2,208	2,469	2,134
Home centres and hardware stores	1,795	2,026	1,765
Specialized building materials and garden stores	413	443	369
Food and beverage stores	7,744	8,225	7,975
Supermarkets	5,573	6,002	5,804
Convenience and specialty food stores	793	847	799
Beer, wine and liquor stores	1,378	1,376	1,373
Pharmacies and personal care stores	2,434	2,533	2,444
Clothing and accessories stores	2,265	2,053	2,181
Clothing stores	1,757	1,593	1,703
Shoe, clothing accessories and jewellery stores	508	459	477
General merchandise stores	4,629	4,391	4,841
Miscellaneous retailers	1,859	1,803	1,809
Sporting goods, hobby, music and book stores	949	823	913
Miscellaneous store retailers	911	980	896
Total retail sales	35,070	35,951	33,954
Total excluding new car dealers, used and recreational motor vehicle and parts dealers	27,893	28,480	27,537
Provinces and territories			
Newfoundland and Labrador	593	619	610
Prince Edward Island	135	144	137
Nova Scotia	1,005	1,031	977
New Brunswick	808	847	787
Quebec	7,623	8,176	7,534
Ontario	12,636	12,695	12,233
Manitoba	1,219	1,290	1,226
Saskatchewan	1,130	1,233	1,161
Alberta	5,128	5,114	4,837
British Columbia	4,675	4,675	4,338
Yukon	40	45	40
Northwest Territories	56	56	51
Nunavut	23	26	24

^r revised

^p preliminary

Note: Figures may not add up to total due to rounding.



Leading indicators

December 2008

The composite index fell by 0.6% in December, matching the drop in November after three months of accelerating declines. The losses remained concentrated in the stock market and housing. Overall, the four components that rose were evenly balanced with the four that decreased, while two were unchanged.

The stock market and the housing index posted losses of 7.9% and 4.5%, respectively, little changed from their drops the month before. However, these declines were largely driven by steep losses in the autumn.

Consumer spending remained resilient, with increases for both furniture and appliances and other durable goods. However, preliminary data point to sharply lower auto sales in December, which is the largest part of spending on other durable goods.

The manufacturing indicators remained mixed. New orders were buoyed by continued strength for aerospace. However, only steep cuts to output kept the

ratio of shipments to stocks from falling. These cuts to production were reflected in a shorter workweek and mounting layoffs at factories. The outlook for export demand remained bleak, as the US leading indicator fell 0.6%, the largest of 16 straight declines.

A more detailed analysis of the components is available online.

Available on CANSIM: table 377-0003.

Definitions, data sources and methods: survey number 1601.

This release will be reprinted in the February 2009 issue of *Canadian Economic Observer*, Vol. 22, no. 1 (11-010-XWE, free). For more information on the economy, consult the *Canadian Economic Observer*.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Philip Cross (613-951-9162; ceo@statcan.gc.ca), Current Economic Analysis Group.

Leading indicators

	July 2008	August 2008	September 2008	October 2008	November 2008	December 2008	Last month of data available % change
Composite leading indicator (1992=100)	229.5	230.0	229.5	228.4	227.0	225.7	-0.6
Housing index (1992=100) ¹	137.1	134.7	134.2	130.3	123.3	117.7	-4.5
Business and personal services employment (thousands)	2,937	2,949	2,953	2,953	2,948	2,947	0.0
S&P/TSX stock price index (1975=1,000)	14,012	14,097	13,660	12,669	11,630	10,709	-7.9
Money supply, M1 (\$ millions, 1992) ²	172,383	172,897	174,030	176,086	178,642	181,140	1.4
US Conference Board leading indicator (1992=100) ³	124.1	123.9	123.5	123.1	122.5	121.8	-0.6
Manufacturing							
Average workweek (hours)	37.8	37.8	37.8	37.7	37.6	37.4	-0.5
New orders, durables (\$ millions, 1992) ⁴	27,667	28,475	28,024	27,691	27,857	28,837	3.5
Shipments/inventories of finished goods ⁴	1.76	1.76	1.76	1.76	1.76	1.76	0.00 ⁵
Retail trade							
Furniture and appliance sales (\$ millions, 1992) ⁴	2,872	2,882	2,911	2,938	2,955	2,966	0.4
Other durable goods sales (\$ millions, 1992) ⁴	9,747	9,711	9,702	9,651	9,681	9,729	0.5
Unsmoothed composite leading indicator	229.6	230.0	227.5	224.9	222.9	223.1	0.1

1. Composite index of housing starts (units) and house sales (multiple listing service).

2. Deflated by the Consumer Price Index for all items.

3. The figures in this row reflect data published in the month indicated, but the figures themselves refer to data for the month immediately preceding.

4. The figures in this row reflect data published in the month indicated, but the figures themselves refer to data for the second preceding month.

5. Difference from previous month.

Natural gas sales

November 2008 (preliminary)

Natural gas sales totalled 6 567 million cubic metres in November, down 2.5% from November 2007.

The volumes of sales to the residential sector (-10.7%) and commercial sector (-5.8%) declined, while sales to the industrial, including direct, sector rose 2.9% from November 2007.

Total sales in November 2008 were 24.9% higher than those in October 2008.

Natural gas sales

	November 2008 ^P	November 2007	November 2007 to November 2008 % change
	thousands of cubic metres		
Total sales	6 566 914	6 733 216	-2.5
Residential ¹	1 630 570	1 826 100	-10.7
Commercial ²	1 203 030	1 277 409	-5.8
Industrial ³ and direct sales ⁴	3 733 314	3 629 707	2.9

^P preliminary

1. Gas sold for domestic purposes, including space heating, water heating and cooking, to a residential dwelling unit.
2. Gas sold to customers engaged in wholesale or retail trade, governments, institutions, office buildings, etc.
3. Gas sold to customers engaged in a process that creates or changes raw or unfinished materials into another form or product. Includes mining and manufacturing establishments. Includes firm, interruptible and buy/sell agreements.
4. Represents direct, non-utility, sales for consumption, where the utility acts solely as the transporter.

Construction Union Wage Rate Index

December 2008

The Construction Union Wage Rate Index (including supplements) for Canada remained unchanged in December compared with the November level of 144.6 (1992=100). The composite index increased 1.4% compared with the December 2007 index (142.6).

Note: Union wage rates are published for 16 trades in 20 metropolitan areas for both the basic rates and rates including selected supplementary payments. Indexes on a 1992=100 time base are calculated for the same metropolitan areas and are published for those where a majority of trades are covered by current collective agreements.

Available on CANSIM: tables 327-0003 and 327-0004.

Definitions, data sources and methods: survey number 2307.

The third quarter 2008 issue of Capital Expenditure Price Statistics (62-007-XWE, free) will be available in February.

Definitions, data sources and methods: survey number 2149.

For more information, to order data, or to enquire about the concepts, methods or data quality of this release, contact the dissemination officer (toll-free 1-866-873-8789; 613-951-9497; energ@statcan.gc.ca), Manufacturing and Energy Division.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Client Services (613-951-9606; fax: 613-951-2848; prices-prix@statcan.gc.ca) or Louise Chainé (613-951-3393), Prices Division.

Stocks of frozen poultry meat

January 1, 2009 (preliminary)

Stocks of frozen poultry meat in cold storage on January 1 totalled 64 592 metric tonnes, up 10.9% from a year ago.

Available on CANSIM: tables 003-0023 and 003-0024.

Definitions, data sources and methods: survey number 3425.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Sandra Venturino (613-951-9278; sandra.venturino@statcan.gc.ca) or Bernadette Alain (902-893-7251; bernadette.alain@statcan.gc.ca), Agriculture Division.

Primary iron and steel

November 2008

Data on primary iron and steel are now available for November.

Available on CANSIM: tables 303-0048 to 303-0051.

Definitions, data sources and methods: survey numbers, including related surveys, 2116 and 2184.

The November 2008 issue of *Steel, Tubular Products and Steel Wire* (41-019-XWE, free) will soon be available.

For more information, or to enquire about the concepts, methods or data quality of this release, contact the dissemination officer (toll-free 1-866-873-8789; 613-951-9497; manufact@statcan.gc.ca), Manufacturing and Energy Division. ■

New products

Canadian Economic Observer, January 2009, Vol. 22, no. 1
Catalogue number 11-010-XPB (\$25/\$243).

Wholesale Trade, November 2008, Vol. 71, no. 11
Catalogue number 63-008-XWE
(free).

Selected Demographic, Cultural, Educational, Labour Force and Income Characteristics (830), Mother Tongue (4), Age Groups (8A) and Sex (3) for the Population of Canada, Provinces, Territories, Census Divisions and Census Subdivisions, 2006 Census - 20% Sample Data, Census year 2006
Catalogue number 97-555-XWE2006057
(free).

Selected Demographic, Cultural, Educational, Labour Force and Income Characteristics (830), Mother Tongue (4), Age Groups (8A) and Sex (3) for the Population of Canada, Provinces, Territories, Census Divisions and Census Subdivisions, 2006 Census - 20% Sample Data, Census year 2006
Catalogue number 97-555-XCB2006057 (\$65).

Selected Demographic, Cultural, Educational, Labour Force and Income Characteristics (830), Mother Tongue (4), Age Groups (8A) and Sex (3) for the Population of Canada, Provinces, Territories, Census Metropolitan Areas and Census Agglomerations, 2006 Census - 20% Sample Data, Census year 2006
Catalogue number 97-555-XWE2006058
(free).

Selected Demographic, Cultural, Educational, Labour Force and Income Characteristics (830), Mother Tongue (4), Age Groups (8A) and Sex (3) for the Population of Canada, Provinces, Territories, Census Metropolitan Areas and Census Agglomerations, 2006 Census - 20% Sample Data, Census year 2006
Catalogue number 97-555-XCB2006058 (\$65).

Selected Demographic, Cultural, Educational, Labour Force and Income Characteristics (926), First Official Language Spoken (4), Age Groups (8A) and Sex (3) for the Population of Canada, Provinces, Territories, Census Divisions and Census Subdivisions, 2006 Census - 20% Sample Data, Census year 2006
Catalogue number 97-555-XWE2006059
(free).

Selected Demographic, Cultural, Educational, Labour Force and Income Characteristics (926), First Official Language Spoken (4), Age Groups (8A) and Sex (3) for the Population of Canada, Provinces, Territories, Census Divisions and Census Subdivisions, 2006 Census - 20% Sample Data, Census year 2006
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