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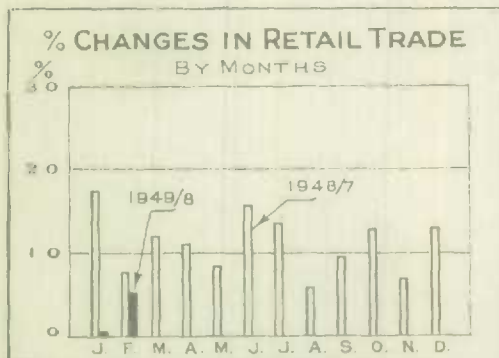
RETAIL TRADE ----- FEBRUARY 1949 (INCL. JANUARY)

Retail sales in Canada was estimated at \$466,900,000 in February. This was down 5% from the January volume of \$493,370,000, higher than the February, 1948 total of \$444,730,000.

January results showed a gain of only one-half of 1% over the previous January. When figures for January and February of the two years are brought together, 1949 sales are found to be up 2.6% over the same period of 1948. This advance is moderate in comparison with the average monthly gain of 11% in 1948 over 1947 (see chart below).

Combined sales for the first two months amounted to \$960,270,000 this year and \$935,530,000 in 1948.

Recent price trends cannot be disregarded if changes in sales are to be properly interpreted. Throughout 1948 the upward movement of prices outmatched sales increases in many lines, especially food and apparel. A levelling off in prices at the year's end has continued into the early months of 1949, and evidently this has had a moderating effect on sales expansion. Clearance sales were prominently featured by many merchants during the early weeks of this year, particularly in the apparel and household durable trades. These probably succeeded in moving out excess stocks, but did not result in an appreciable rise in dollar sales volume above last year's level.



A majority of the individual trades had higher sales in the first two months of this year than last. Most increases were small, both in February and in the two-month cumulative comparison. Similarly, in the case of those trades which failed to equal 1948 volume, decreases were of minor proportions. The fact that 13 of the listed trades had increases or decreases of 4% or less reflects the unusual uniformity of trend among them.

January-February increases of 6% for grocery and combination stores and 9% for department stores were largely responsible for keeping retail volume ahead of last year. Other trades which obtained sizable sales increases over last year were: meat stores (11%), variety stores (7%), women's clothing stores (8%) and lumber and building material dealers (13%). The latter was the highest increase which any of the individual trades recorded during the first two months of the year.

Motor vehicle dealers' sales were down 13% in January and February this year from a year ago, falling off more sharply than sales of other kinds of businesses. Reduced deliveries to dealers, as assembly lines turned to the production of 1949 models, partially explains the reduction.

Higher sales increases were recorded in the Prairie Provinces than elsewhere in the first two months of this year. A record level of cash farm income in 1948, including large supplementary grain payments, provided a fund of purchasing power which was not exhausted last year and helped to maintain sales on a high plane in the early part of 1949. Sales were up 8% in Manitoba, 11% in Saskatchewan and 15% in Alberta during the first two months of 1949. Quebec and Ontario barely exceeded 1948 volume, while British Columbia sales were unchanged from last year and the Maritime Provinces reported retail business down 2% from a year ago.

The chart on Page 3 traces monthly sales for three of the trades covered in this publication. Other trades will be given the same graphical presentation in subsequent issues.

This report is the first in a new monthly series featuring dollar estimates for an enlarged number of trades. It replaces the former monthly bulletin which employed index numbers as a guide to changes in retail business. A summary bulletin giving details for 1941, 1947 and 1948 was issued recently.

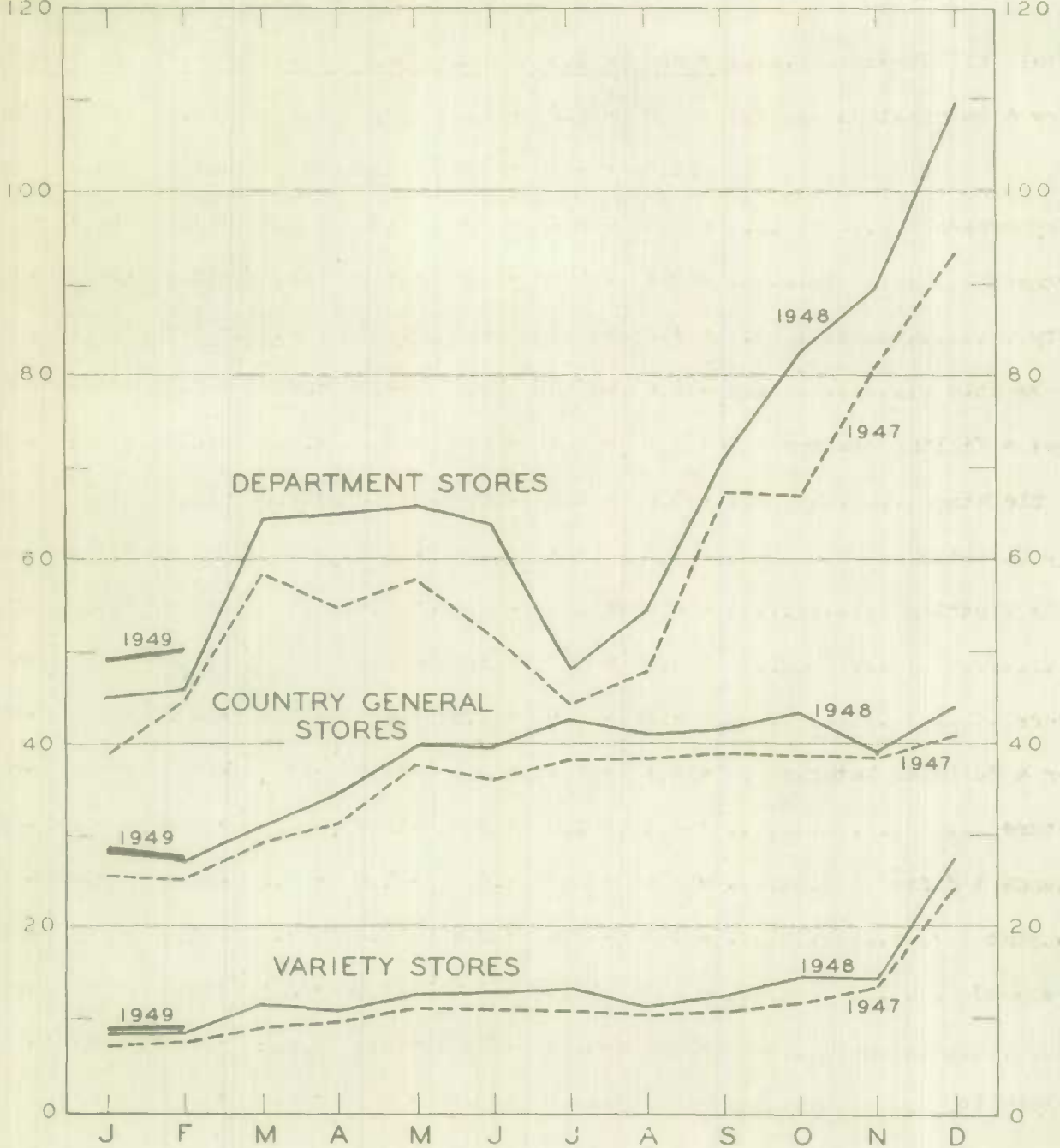
Results quoted in this bulletin are estimates based on reports filed by a sample of retail chain and independent companies.

Figures for Newfoundland, the Yukon and Northwest Territories are not included in the published results.

MONTHLY SALES GENERAL MERCHANDISE TRADES

MILLION
DOLLARS
120

MILLION
DOLLARS
120



PERCENTAGE CHANGES IN RETAIL TRADE
By Provinces and Kinds of Business

(Without Adjustment for Price Changes)

February, 1949 Over February, 1948

Kind of Business or Store	CANADA	Mar. Prov.	Que.	Ont.	Man.	Sask.	Alta.	Br. Col.
	%	%	%	%	%	%	%	%
Total, All Trades	+ 5.0	- 2.5	+ 1.2	+ 4.4	+ 9.9	+21.6	+21.5	+ 1.6
Grocery & Combination	+ 9.8	+ 1.2	+ 8.9	+10.2	+11.1	+16.1	+23.3	+10.8
Meat	+12.9	+ 8.3	+13.7	+12.8	+31.3	+22.7	+31.8	(a)
Country General	+ 3.6	- 2.6	+ 0.6	(a)	+ 4.3	+10.1	+14.7	+ 3.9
Department	+ 9.4	+12.2	+ 1.6	+ 8.2	+11.5	+17.8	+28.4	+ 8.4
Variety	+ 7.0	+ 6.2	+ 4.8	+10.8	- 4.3	+ 3.7	+11.1	- 2.1
Motor Vehicle	- 9.4	-27.6	-15.3	-14.3	+24.7	+ 7.9	+24.4	- 6.3
Garages & Filling Stations ..	+ 1.1	- 8.5	+ 4.8	+ 1.6	-10.9	+44.2	+10.2	-12.0
Men's Clothing	- 5.5	- 6.8	-20.3	+ 0.2	+15.6	+12.0	(a)	- 9.8
Family Clothing	- 3.2	-11.4	- 4.4	- 1.1	- 9.4	- 2.4	+12.9	- 3.3
Women's Clothing	+ 8.0	+13.5	+ 3.4	+ 5.4	(b)	+42.9	+14.0	-10.9
Shoe	- 3.4	- 6.7	- 2.1	+ 0.9	(a)	+28.6	+23.1	-36.4
Hardware	+ 2.4	- 5.5	+ 1.5	+ 4.6	- 3.6	+14.5	+18.5	-15.6
Lumber & Building Material ..	+17.3	+24.3	+ 2.8	+36.3	+13.3	+18.0	+ 5.0	-24.1
Furniture	+ 4.5	- 1.9	+ 3.4	+13.2	-21.4	+15.4	+ 2.0	-17.4
Appliance & Radio	- 3.8	+28.0	-16.5	- 1.0	+ 6.3	- 6.2	+ 3.4	- 5.6
Restaurant	- 1.3	- 2.6	+ 3.2	- 2.9	- 1.1	- 2.9	+ 8.8	- 7.3
Coal & Wood	- 1.5	-15.9	-12.6	-11.2	+30.1	+23.0	(b)	+82.7
Drug	+ 4.1	+ 1.9	+ 4.0	+ 3.4	+ 4.5	+ 9.0	+ 9.0	+ 2.0
Jewellery (c)	- 0.9	-13.6	- 5.3	- 2.1	+35.0	+36.4	- 4.8	(a)
Tobacco	+ 1.7	(a)	+ 1.5	+ 2.5	(a)	+ 6.3	+18.2	- 4.1
All Others	+10.1	+ 4.1	+ 2.4	+ 9.1	+ 1.2	+58.5	+38.5	+ 4.6

(a) Unchanged. (b) Not available.

(c) Sales upon which comparisons are based included 25% Federal tax levied at consumer level.

PERCENTAGE CHANGES IN RETAIL TRADE
By Provinces and Kinds of Business

(Without Adjustment for Price Changes)

January-February, 1949 Over January-February, 1948

Kind of Business or Store	CANADA	Mar. Prov.	Que.	Ont.	Man.	Sask.	Alta.	Br. Col.
	%	%	%	%	%	%	%	%
Total, All Trades	+ 2.6	- 2.3	+ 2.2	+ 0.8	+ 7.6	+11.2	+15.1	(a)
Grocery & Combination	+ 6.1	- 1.1	+ 6.6	+ 5.3	+ 8.1	+ 8.6	+18.9	+ 7.1
Meat	+11.4	+ 9.0	+13.0	+10.1	+16.7	+17.2	+29.0	+ 2.5
Country General	+ 1.5	- 3.7	+ 1.9	- 1.2	+ 1.0	+ 3.9	+ 8.0	+ 2.1
Department	+ 9.3	+16.3	+ 6.1	+ 6.7	+11.0	+15.4	+20.9	+ 8.9
Variety	+ 6.9	+ 5.6	+ 8.0	+ 9.8	- 6.4	- 1.9	+ 6.8	- 4.2
Motor Vehicle	-13.2	-26.8	-10.7	-17.2	+ 5.1	+ 0.6	+ 3.6	-19.0
Garages & Filling Stations ..	+ 2.8	+ 9.9	+ 3.3	+ 2.2	+ 1.9	+20.7	+ 1.2	- 6.3
Men's Clothing	- 0.8	- 3.1	- 4.6	+ 1.9	+21.1	+ 3.4	- 4.7	-12.2
Family Clothing	+ 0.8	- 4.7	- 0.9	+ 4.9	- 8.8	- 4.2	+ 9.1	(a)
Women's Clothing	+ 8.2	+ 7.7	+ 8.1	+10.0	+30.9	+26.5	+ 1.0	- 7.3
Shoe	+ 2.7	- 3.2	+ 9.5	+ 6.3	- 4.0	+11.8	+ 5.9	-28.1
Hardware	+ 3.9	- 2.5	+ 3.8	+11.8	- 3.7	+ 6.7	+ 5.6	-15.9
Lumber & Building Material ..	+12.9	+26.0	+ 8.8	+27.0	+14.0	+10.1	+ 3.2	-23.6
Furniture	- 0.9	- 1.9	- 1.0	+ 4.9	-17.9	(a)	+ 1.7	-20.9
Appliance & Radio	- 0.8	+29.4	- 3.3	- 0.1	+ 4.5	-21.2	+ 3.1	- 8.3
Restaurant	- 0.2	+ 0.7	+ 5.7	- 2.0	- 3.0	- 2.8	+ 8.7	- 4.8
Coal & Wood	- 3.9	-19.1	-13.7	-11.8	+21.5	+25.1	+64.9	+62.6
Drug	+ 2.9	- 0.5	+ 2.4	+ 3.0	+ 3.3	+ 7.1	+ 4.8	+ 0.7
Jewellery (b)	- 4.0	- 9.1	- 6.5	- 5.9	+26.2	+11.1	- 4.0	- 5.6
Tobacco	+ 2.3	- 2.0	+ 3.2	+ 3.1	- 3.4	+ 2.9	+23.8	- 5.9
All Others	+ 4.5	+ 1.9	+ 2.0	- 1.9	+ 7.0	+27.2	+39.4	+ 5.0

(a) Unchanged. (b) Sales upon which comparisons are based included 25% Federal tax levied at consumer level.

ESTIMATED RETAIL TRADE - BY PROVINCES AND KINDS OF BUSINESS

JANUARY, 1949
(in thousands of dollars)

Kind of Business or Store	CANADA*	Maritime Provinces	Quebec	Ontario	Manitoba	Saskat- chewan	Alberta	British Columbia
Total, All Trades	493,370	36,100	113,810	200,070	29,050	26,550	37,120	50,640
Grocery & Combination	94,070	8,350	27,540	37,750	3,990	3,380	4,930	8,110
Meat	13,410	460	3,830	5,210	420	550	1,000	1,930
Country General	28,530	3,880	6,140	5,740	2,040	4,060	3,980	2,690
Department	49,060	3,010	7,940	18,330	7,460	2,330	3,200	6,780
Variety	8,780	830	2,740	3,930	220	240	380	450
Motor Vehicle	43,840	3,450	9,570	17,970	2,410	2,790	4,070	3,570
Garages & Filling Stations	25,630	2,250	4,930	11,400	1,430	1,110	1,960	2,550
Men's Clothing	11,310	710	2,700	5,630	490	330	550	890
Family Clothing	9,420	930	2,970	3,530	330	500	370	790
Women's Clothing	10,540	420	2,050	5,260	480	460	570	1,310
Shoe	5,270	320	1,610	2,430	130	100	200	470
Hardware	10,500	670	2,560	4,200	490	640	1,000	930
Lumber & Building Material	12,110	460	1,250	5,380	1,090	1,220	1,760	960
Furniture	8,820	550	2,310	4,150	120	160	690	840
Appliance & Radio	7,170	340	1,860	3,560	350	110	370	600
Restaurant	20,120	800	3,480	9,260	1,000	1,060	1,900	2,620
Coal & Wood	17,880	1,310	3,360	8,550	1,730	1,070	310	1,560
Drug	14,620	1,070	2,600	6,690	930	770	1,010	1,530
Jewellery (a)	3,740	210	960	1,470	260	150	280	420
Tobacco	7,630	240	2,110	3,980	140	180	260	720
All Others	90,920	5,840	21,300	35,650	3,540	5,340	8,330	10,920

* Canada totals do not include Newfoundland, Northwest Territories and Yukon figures.

(a) Sales upon which comparisons are based included 25% Federal tax levied at consumer level.

ESTIMATED RETAIL TRADE - BY PROVINCES AND KINDS OF BUSINESS

FEBRUARY, 1949
(in thousands of dollars)

Kind of Business or Store	CANADA*	Maritime Provinces	Quebec	Ontario	Manitoba	Saskat- chewan	Alberta	British Columbia
Total, All Trades	466,900	33,350	108,660	190,900	28,110	25,390	33,240	47,220
Grocery & Combination	92,880	8,140	27,270	37,440	3,890	3,470	4,550	8,110
Meat	12,780	390	3,910	4,840	420	540	870	1,810
Country General	27,640	3,410	6,390	5,470	1,950	3,920	3,830	2,680
Department	50,130	3,040	7,660	20,090	7,440	2,250	3,210	6,440
Variety	8,980	860	2,640	4,120	220	280	400	470
Motor Vehicle	36,340	2,800	7,500	14,520	2,320	1,920	3,770	3,410
Garages & Filling Stations	22,070	1,840	4,400	10,090	1,230	1,110	1,510	1,900
Men's Clothing	9,500	550	2,080	4,910	370	280	470	830
Family Clothing	7,810	700	2,800	2,670	290	410	350	580
Women's Clothing	8,770	420	1,800	4,090	(a)	400	490	980
Shoe	4,520	280	1,380	2,140	110	90	160	350
Hardware	8,940	520	2,060	3,180	540	630	1,090	920
Lumber & Building Material	11,580	460	1,090	5,630	940	1,180	1,470	820
Furniture	8,970	510	2,410	4,380	110	150	510	900
Appliance & Radio	6,090	320	1,370	3,100	340	150	300	510
Restaurant	18,730	740	3,250	8,810	910	990	1,730	2,290
Coal & Wood	17,000	1,270	3,260	7,860	1,770	1,070	(a)	1,480
Drug	14,170	1,070	2,580	6,370	930	730	970	1,510
Jewellery (b)	3,490	190	890	1,380	270	150	200	420
Tobacco	7,330	240	2,070	3,750	140	170	260	710
All Others	89,180	5,600	21,760	36,060	3,340	5,500	6,800	10,100

* Canada totals do not include Newfoundland, Northwest Territories and Yukon figures.

(a) Not available.

(b) Sales upon which comparisons are based included 25% Federal tax levied at consumer level.

DEPARTMENT STORE SALES AND INVENTORIES

February, 1948 and February, 1949

These figures are estimates of total department store sales and inventories.
Inventories are at selling value.

Department	SALES			INVENTORY*		
	Feb. 1948 (\$000)	Feb. 1949 (\$000)	% Change 1949/48	Jan. 31, 1948 (\$000)	Jan. 31, 1949 (\$000)	% Change 1949/48
TOTAL, ALL DEPARTMENTS ..	45,857	50,128	+ 9.3	143,231	163,643	+14.3
1. Women's dresses, coats and suits	4,816	5,299	+10.0	11,167	15,436	+38.2
2. Girls' and infants' wear.	1,353	1,527	+12.9	4,191	6,424	+53.3
3. Hosiery and gloves	1,431	1,438	+ 0.5	3,432	4,686	+36.5
4. Lingerie and corsets	1,764	1,983	+12.4	4,534	5,625	+24.1
5. Millinery	357	399	+11.8	781	961	+23.0
6. Women's and children's apparel - (Total, 1-5) .	9,721	10,646	+ 9.5	24,105	33,132	+37.4
7. Men's and boys' clothing and furnishings	4,042	4,351	+ 7.6	15,027	18,104	+20.5
8. Drugs, toilet articles and preparations	1,273	1,337	+ 5.0	4,207	4,079	- 3.0
9. Piece goods	3,930	4,588	+16.7	12,295	15,520	+26.2
10. Smallwares	1,667	1,798	+ 7.9	6,358	6,462	+ 1.6
11. Food and kindred products	4,800	4,355	- 9.3	6,896	4,242	-38.5
12. Furniture (including mattresses and springs).	3,359	3,905	+16.3	11,064	10,608	- 4.1
13. Home furnishings	4,015	4,584	+14.2	18,072	19,874	+10.0
14. Household appliances and electrical supplies	2,010	2,366	+17.7	5,616	6,635	+18.1
15. Hardware and kitchen utensils	2,101	2,273	+ 8.2	8,132	8,420	+ 3.5
16. Radios, musical instru- ments and supplies	840	1,040	+23.8	3,510	3,277	- 6.6
17. Shoes and other footwear.	2,461	2,653	+ 7.8	11,104	13,549	+22.0
18. Stationery, books and magazines	872	966	+10.8	2,791	2,843	+ 1.9
19. All other departments, total	4,766	5,266	+10.5	14,054	16,898	+20.2

* Comparisons are based on inventories at the beginning of February in the two years.