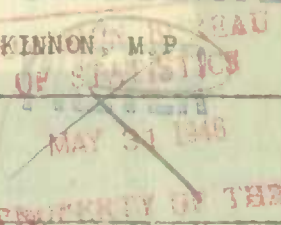


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PRELIMINARY REPORT ON DEPARTMENT STORE SALES, APRIL, 1946

The dollar sales of Canadian department stores in April increased 30 per cent over April, 1945. Concentration of Easter purchasing in April of this year and in March of last year accounts for a certain portion of the increase between April of the two years. April, 1946 business was not able to attain the high level of March sales, declining 4 per cent from the preceding month's volume. The cumulative increase in sales for the first four months of this year over last amounted to 18 per cent. In comparison with 1945 sales volume, indications are that there is a current widening in the extent of expansion. An increase of 12 per cent in January and one of 19 per cent in February combined to produce a 16 per cent gain in the first two months of this year over last. The cumulative results for the first quarter of the year were affected by the variable date of Easter, to the extent that a 14 per cent increase between the first quarters of 1945 and 1946 could not be considered as a reliable reflection of the relative levels of trading in the two years. With the Easter factor accounted for in both years at the end of April, the 18 per cent increase emphasizes the broadening sales expansion currently taking place. Unadjusted indexes (on the base, 1935-1939 = 100) stood at 213.4 for April, 1946, 164.8 for April, 1945 and 222.2 for March, 1946.

The adjusted sales index for April stood at 207.5, having fallen sharply from the outstanding mark recorded in March when the index rose to 258.7, thirty-six points higher than the previous record peak.

INDEXES OF THE DOLLAR VALUE OF DEPARTMENT STORE SALES IN CANADA, 1935-1939=100

	1945		1946	
	<u>April</u>	<u>February</u>	<u>March</u>	<u>April</u>
Unadjusted Indexes	164.8	162.2	222.2	213.4
Adjusted Indexes	171.7	215.6	258.7	207.5

Increases in April sales were widespread and, apart from a comparatively moderate gain of 13 per cent in the Maritime Provinces, showed marked upward movements elsewhere. Quebec, Ontario and the Prairie Provinces reported increases of 31 per cent, 34 per cent, and 30 per cent respectively, gains which exceeded that for the country as a whole, while British Columbia had a slightly lower increase of 24 per cent. Comparisons for the first four months of this year over last on a regional basis reveal that Quebec and Ontario department stores led other regions with gains of 21 and 20 per cent respectively. The Prairie Provinces and British Columbia are grouped with identical gains of 16 per cent in the same comparison, while the increase in the Maritime Provinces for the first four months of this year over last amounted to 11 per cent.

Nineteen firms reported sales on a departmental basis for April and the aggregate business done by these companies was 28 per cent higher than in April a year ago. Household appliances departments and those handling radios and musical instruments extended their gains in the month under review and sales volume was al-



most two and one-half times greater than in April, 1945. Sales increases for other durable goods departments were consistent with those which have been experienced in earlier months. Women's apparel, which in recent months has lagged behind the average increase in business for all departments, recorded a gain of 28 per cent in April. A 47 per cent increase in millinery sales featured the results for individual commodity groupings in the ladies' wear departments, while an active demand for dresses and coats is reflected in a gain of 31 per cent in April. Stationery departments handled 46 per cent more business in April this year than last and a 27 per cent increase for smallwares was more prominent than gains which that department has recorded in a considerable period of time.

DEPARTMENT STORE SALES IN OTTAWA

Sales of Ottawa department stores were 37 per cent higher in April, 1946 compared with April, 1945 and were up 21 per cent in the first four months of this year over the same period of 1945.

DEPARTMENT STORE SALES IN CANADA, BY SELECTED DEPARTMENTS

April, 1945 and April, 1946

(Based on dollar sales of 19 firms including mail order houses)

	April, 1945	April, 1946	% Change, 1946/1945
	\$	\$	
TOTAL SALES, ALL DEPARTMENTS .....	30,834,573	39,523,286	+28.2
1. Women's dresses, coats and suits .....	3,768,567	4,924,209	+30.7
2. Girls' and infants' wear .....	1,269,535	1,620,500	+27.6
3. Hosiery and gloves .....	1,274,196	1,490,681	+17.0
4. Lingerie and corsets .....	1,171,186	1,459,108	+24.6
5. Millinery .....	467,093	685,560	+46.8
6. Women's and children's apparel - (Total, 1-5) .....	7,950,577	10,180,058	+28.0
7. Men's and boys' clothing and furnishings .....	3,280,521	4,185,428	+27.6
8. Drugs and toilet articles and preparations ...	856,244	973,484	+13.7
9. Piece goods .....	2,486,172	2,697,688	+ 8.5
10. Smallwares .....	1,019,905	1,291,212	+26.6
11. Food and kindred products .....	2,609,517	2,966,648	+13.7
12. Furniture (including mattresses and springs) .	2,096,228	2,948,291	+40.6
13. Home furnishings .....	2,321,668	2,851,041	+22.8
14. Household appliances and electrical supplies .	433,938	1,084,245	+149.9
15. Hardware and kitchen utensils .....	1,603,421	2,055,039	+28.2
16. Radios, musical instruments and supplies .....	186,521	456,374	+144.7
17. Shoes and other footwear .....	2,319,860	2,823,226	+21.7
18. Stationery, books and magazines .....	419,827	614,393	+46.3
19. All other departments, total .....	3,250,174	4,396,159	+35.3