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DOMINION BUREAU OF STATISTICS  
MERCHANDISING AND SERVICES SECTION  
OTTAWA, CANADA

Dominion Statistician:	Herbert Marshall
Director, Industry and Merchandising Division:	W. H. Losee
Chief, Merchandising and Services Section:	C. H. McDonald
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CURRENT TRENDS IN FOOD DISTRIBUTION

October, 1948

This bulletin brings together the information on retail grocery and wholesale grocery and fruit and vegetable sales contained in other monthly bulletins on the retail and wholesale trade, thus facilitating a comparison of the trends in monthly sales in the two stages of food distribution.

WHOLESALE TRADE

Grocers' Sales

Grocery wholesalers' sales in October dropped 10% below the dollar volume for the same month a year ago and 3% below September according to statements from 72 of the larger wholesalers across the country. The cumulative gain for the year to date compared with the first ten months of 1947 declined to 6% with the October decrease. The only region to register an increase in volume of sales over October a year ago was the Prairie Provinces where sales were up 2%. Decreases were recorded in the other regions as follows: British Columbia, 9%; the Maritime Provinces and Quebec, 11%; and Ontario, 17%.

Fruit and Vegetable Dealers' Sales

Dollar sales of wholesalers of fruits and vegetables were 17% lower in October, 1948 than in the same month of 1947 and 16% below sales in September, 1948. These figures are based on statements submitted by 48 of the larger wholesalers across the country. Cumulative sales for the first ten months of 1948 were 16% below the dollar volume for the corresponding period of 1947. The decline in the Western Provinces, 9% was less marked than in the East. Ontario sales dropped 23% from 1947 and sales in the Maritimes and Quebec combined were down 24%.

Grocers' Inventories

Wholesale grocers' inventories at the end of October were valued 18% higher than at the same date a year ago and 11% higher than at the beginning of the month. Inventories at the beginning of October are normally 17% in excess of sales in that month (based on the average of 1935 - 1942), while stocks at the beginning of October this year were valued 1% lower than the sales volume for that month.

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Wholesale Grocery Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		Jan. -to-
		October, 1947	October, 1948	October, 1948 over October, 1947      Sept., 1948		Oct., 1948
		\$	\$			Jan. -to- Oct., 1947
CANADA .....	72	33,377	30,144	- 9.7	- 3.0	+ 6.0
Maritime Provinces	15	4,712	4,183	-11.2	+ 4.5	+ 5.0
Quebec .....	18	4,339	3,843	-11.4	+ 4.2	+ 1.0
Ontario .....	22	12,834	10,690	-16.7	- 2.3	+ 3.4
Prairie Provinces.	12	8,754	8,926	+ 2.0	- 7.6	+13.8
British Columbia .	5	2,738	2,502	- 8.6	- 4.5	+11.5

Wholesale Fruit and Vegetable Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		Jan. -to-
		October, 1947	October, 1948	October, 1948 over October, 1947      Sept., 1948		Oct., 1948
		\$	\$			Jan. -to- Oct., 1947
CANADA .....	48	10,755	8,955	-16.7	-15.8	-15.7
Maritimes & Quebec	16	1,947	1,476	-24.2	- 1.9	-21.6
Ontario .....	18	3,962	3,067	-22.6	-17.5	-12.7
Western Provinces.	14	4,846	4,412	- 9.0	-22.2	-16.9

# RETAIL TRADE

Chain Stores - October, 1948 sales of 975 chain store units operated by 28 chain companies in the food retailing field were 29% higher than sales of 974 stores operated by 28 firms in October 1947. Average sales per store were \$34,489 in October, 1948 and \$26,682 in the same month of the previous year.

Increases amounted to more than 25% in all sections of the country except the Maritime Provinces where the gain was held to 15%.

## Comparison of Stores and Sales for October, 1947 and 1948

	October, 1947		October, 1948		% Change in Sales <u>October, 1948</u> <u>October, 1947</u>
	No. of Stores	Sales \$	No. of Stores	Sales \$	
CANADA .....	974	25,988,700	975	33,626,300	+29.4
Maritime Provinces .....	74	1,101,200	73	1,266,900	+15.1
Quebec .....	162	5,603,500	159	7,191,100	+28.3
Ontario .....	496	13,807,600	495	18,164,900	+31.6
Prairie Provinces .....	107	2,868,300	105	3,699,200	+29.0
British Columbia .....	135	2,608,100	143	3,304,200	+26.7

Independent Stores - Sales of independent food stores were 7% higher in October this year than in October, 1947. Only in Manitoba where the gain was 16%, did results for any region vary appreciably from the Canada Average.

## Comparison of Sales Reported for October, 1947 and 1948

	No. of Stores Reporting	No. Reporting An Increase	% Change in Sales <u>October, 1948</u> <u>October, 1947</u>
CANADA .....	844	528	+ 7.3
Maritime Provinces .....	147	98	+ 7.6
Quebec .....	199	123	+ 5.2
Ontario .....	222	134	+ 8.5
Manitoba .....	57	38	+15.9
Saskatchewan .....	34	22	+10.3
Alberta .....	64	48	+ 8.3
British Columbia .....	121	65	+ 3.9

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