

Published by Authority of the Rt. Hon. C.D. Howe.,  
Minister of Trade and Commerce

DEPARTMENT OF TRADE AND COMMERCE  
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Vol. 10 - No. 11.	16-4050

17

CURRENT TRENDS IN FOOD DISTRIBUTION

JAN 22 1948

November, 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

Sales of wholesale grocers in November, 1948 were 4% lower in dollar volume than in November, 1947 and 7% below the October, 1948 volume according to statements submitted by 70 of the larger firms across Canada. Cumulative sales for the 11 months of 1948 were 5% in excess of the volume for the corresponding period of 1947. An increase of 9% was recorded for British Columbia while wholesalers in all other regions recorded decreases. Sales in the Prairies were down 2% from November, 1947, in the Maritimes, 7%, in Quebec, 8%, and in Ontario, 9%.

Fruit and Vegetable Wholesalers' Sales

Fruit and vegetable wholesalers' sales were 2% below the November, 1947 level but 13% higher than the dollar sales in October, 1948 according to reports from 50 of the larger dealers across the country. The cumulative figures for the 11 months of 1948 show a drop of 15% from the sales volume of the corresponding period of 1947. Fruit and vegetable wholesalers in the Western Provinces reported an increase over November, 1947 of 6%, while in Ontario, sales were down 2% and in the Maritimes and Quebec combined, there was a drop of 13%.

Grocers' Stocks

Inventories of wholesale grocers were valued 21% higher at November 30, 1948 than at the same date in 1947, and were 7% higher than at the beginning of the month. Inventories at the beginning of November are normally 43% in excess of the sales volume in that month (based on the average of 1935-1942), while stocks at the beginning of November this year were 21% higher than the November sales volume.

Year's subscription	\$1.00
Single copies	.10

Wholesale Grocery Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		Jan. -to- Nov., 1948
		November, 1947	November, 1948	November, 1947	November, 1948 over October, 1948	Jan. -to- Nov., 1947
		\$	\$			
CANADA .....	70	32,013	30,731	- 4.0	- 6.9	+ 5.0
Maritime Provinces	16	4,638	4,323	- 6.8	- 6.6	+ 3.9
Quebec .....	15	2,579	2,365	- 8.3	- 6.5	- 0.1
Ontario .....	21	11,135	10,146	- 8.9	- 6.3	+ 2.1
Prairie Provinces.	12	8,831	8,621	- 2.4	-12.1	+ 8.2
British Columbia .	6	4,830	5,276	+ 9.2	- 2.7	+11.9

Wholesale Fruit and Vegetable Trade by Economic Divisions

Division	Number, of firms reporting	Dollar Sales (add 000)		Per cent change		Jan. -to- Nov., 1948
		November, 1947	November, 1948	November, 1947	November, 1948 over October, 1948	Jan. -to- Nov., 1947
		\$	\$			
CANADA .....	50	9,399	9,231	- 1.8	+12.8	-14.6
Maritimes & Quebec	17	2,254	1,963	-12.9	+40.4	-18.7
Ontario .....	19	3,620	3,533	- 2.4	+25.1	-11.9
Western Provinces.	14	3,525	3,735	+ 5.9	- 1.7	-14.7

# RETAIL TRADE

Chain Stores - November, 1948 sales of 972 chain store units operated by 27 chain companies in the food retailing field were 12% higher than sales of 979 stores operated by 27 firms in November 1947. Average sales per store were \$32,060 in November, 1948 and \$28,437 in the same month of the previous year.

Sales in the Maritime Provinces were up only 3% from November, 1947. Other provinces had increases which were consistent with the average gain for Canada as a whole.

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

	November, 1947		November, 1948		% Change in Sales November, 1948 November, 1947
	No. of Stores	Sales \$	No. of Stores	Sales \$	
CANADA .....	979	27,839,500	972	31,162,400	+11.9
Maritime Provinces .....	74	1,141,100	70	1,177,600	+ 3.2
Quebec .....	162	5,790,500	159	6,684,800	+15.4
Ontario .....	485	15,019,600	486	16,728,500	+11.4
Prairie Provinces .....	107	3,017,700	104	3,342,000	+10.8
British Columbia .....	151	2,870,600	153	3,229,500	+12.5

Independent Stores - Sales of independent food stores increased 6% in November, 1948 compared with November, 1947. Quebec, Manitoba and Alberta with gains of 8%, 10% and 13% respectively, recorded the greatest gains.

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

	No. of Stores Reporting	No. Reporting An Increase	% Change in Sales November, 1948 November, 1947
CANADA .....	709	404	+ 5.7
Maritime Provinces .....	128	71	+ 4.3
Quebec .....	156	92	+ 7.8
Ontario .....	190	100	+ 3.7
Manitoba .....	50	34	+ 9.7
Saskatchewan .....	36	19	+ 3.3
Alberta .....	55	35	+12.5
British Columbia .....	94	53	+ 3.9





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