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CURRENT TRENDS IN FOOD DISTRIBUTION

December, 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

Dollar sales of wholesale grocers for Canada as a whole were only slightly higher than in December a year ago but were 16% lower than in November, 1948 according to statements submitted by 72 of the larger wholesalers across the country. Sales for the twelve months of 1948 were 5% higher than for the year 1947. Results for December, 1948 compared with December, 1947 varied for different regions of the country. Wholesalers in the Maritime Provinces and Quebec combined reported only a slight decline from December a year ago, while those in Ontario registered a decrease of 4%. A gain of 3% was recorded by wholesale grocers in the Prairie Provinces and of 10% by those in British Columbia.

Fruit and Vegetable Wholesalers' Sales

For the first time in 1948, sales of fruit and vegetable wholesalers in December rose above the 1947 level with an increase of 7%. Sales for December also showed a slight increase of 1% over those for November, 1948. These figures are based on statements received from 48 of the larger dealers across the country. The cumulative figure for the year 1948 remains 13% below the volume for the 12 months of 1947. The results for December compared with December a year ago varied by regions. Fruit and vegetable wholesalers in the Maritimes and Quebec combined reported dollar sales 8% below December, 1947 while gains of 6% and 17% were recorded for Ontario and the Western Provinces.

Grocers' Inventories

Stocks in the hands of wholesale grocers at December 31, 1948 were valued only 1% higher than at the same date last year and 8% below the value at the beginning of the month. Inventories at the beginning of

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December are normally 64% in excess of sales in that month (based on the average of 1935 - 1942), while stocks at the beginning of December, 1948 were valued 42% higher than the sales volume in that month.

Wholesale Grocery Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		Jan. -to- Dec., 1948
		December, 1947	December, 1948	December, 1948 over December, November, 1947	1948	Jan. -to- Dec., 1947
		\$	\$			
CANADA .....	72	25,306	25,358	+ 0.2	-16.4	+ 4.7
Maritime Provinces.	15	3,688	3,675	- 0.4	-13.7	+ 3.5
Quebec .....	18	3,009	2,995	- 0.5	-17.3	+ 0.2
Ontario .....	22	9,505	9,142	- 3.8	-10.6	+ 1.7
Prairie Provinces .	12	6,916	7,147	+ 3.3	-25.9	+ 7.9
British Columbia ..	5	2,188	2,399	+ 9.7	-10.6	+11.7

Wholesale Fruit and Vegetable Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		Jan. -to- Dec., 1948
		December, 1947	December, 1948	December, 1948 over December, November, 1947	1948	Jan. -to- Dec., 1947
		\$	\$			
CANADA .....	48	8,713	9,291	+ 6.6	+ 1.0	-13.1
Maritimes & Quebec	17	2,072	1,907	- 8.0	-12.3	-20.5
Ontario .....	18	3,284	3,465	+ 5.5	+ 2.0	-10.7
Western Provinces.	13	3,357	3,919	+16.7	+ 1.5	-12.4

# RETAIL TRADE

Chain Stores - December, 1948 sales of 963 chain store units operated by 26 chain companies in the food retailing field were 28% higher than sales of 975 stores operated by the same 26 firms in December, 1947. Average sales per store were \$37,243 in December, 1948 and \$28,827 in the same month of the previous year.

The Quebec increase of 31% was highest among the regional changes, while the lowest gain was one of 18% in the Maritime Provinces.

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

	December, 1947		December, 1948		% Change in Sales December, 1948 December, 1947
	No. of Stores	Sales \$	No. of Stores	Sales \$	
CANADA .....	975	28,106,400	963	35,864,600	+27.6
Maritime Provinces .....	60	1,079,000	56	1,268,700	+17.6
Quebec .....	162	5,729,600	158	7,502,900	+31.0
Ontario .....	495	15,445,500	494	19,566,300	+26.7
Prairie Provinces .....	107	2,904,200	103	3,689,800	+27.1
British Columbia .....	151	2,948,100	152	3,836,900	+30.2

Independent Stores - Sales of independent food stores increased 14% in December, 1948 compared with December, 1947.

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

	No. of Stores Reporting	No. Reporting An Increase	% Change in Sales December, 1948 December, 1947
CANADA .....	735	511	+13.6
Maritime Provinces .....	129	84	+11.1
Quebec .....	176	118	+14.7
Ontario .....	189	138	+14.7
Manitoba .....	51	37	+18.4
Saskatchewan .....	33	27	+17.5
Alberta .....	60	41	+13.5
British Columbia .....	97	66	+ 8.7

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