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Dominion Statistician:	Herbert Marshall
Director, Division of Census of Industry and Merchandising:	W. H. Losee
Chief, Merchandising and Services Statistics:	C. H. McDonald
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CURRENT TRENDS IN FOOD DISTRIBUTIONMarch, 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 TRADEGrocers' Sales.

Wholesale grocers' sales in March, 1948 were 4% higher in dollar volume than in March, 1947 and 12% higher than in the preceding month according to statements submitted by 78 of the larger wholesalers across Canada. An increase of 13% over last year was reported for British Columbia, 7% for the Maritime Provinces and 6% for Ontario, while dollar sales were down in Quebec and the Prairie Provinces by 3% and 2% respectively.

Cumulative dollar sales for the first quarter of 1948 were 2% higher than in the corresponding period of 1947. Only slight gains of less than one per cent were reported for the year to date in the Eastern provinces while a drop of one per cent was recorded in the Prairies. British Columbia was the only province to show a marked increase in dollar volume of business, sales for the year to date there being 15% higher than in the first three months of 1947.

Fruit and Vegetable Dealers' Sales.

Advancing 11% from February, sales of fruit and vegetable wholesalers in March, 1948 were still 14% below the dollar volume of March, 1947 according to reports from 50 of the larger dealers across the country. Sales in British Columbia were down 18%; in the Maritimes, and Quebec combined, 15%; while Ontario sales were 9% lower than in the same month a year ago.

Cumulative sales for the first three months of 1948 were 11% below the dollar volume recorded for the first three months of the previous year. Wholesalers in the Maritimes, Quebec and Ontario registered an 8% drop in sales for this period, while in the Western provinces, sales for the first quarter of the current year were 15% lower than in the corresponding period of 1947.

# Grocers' Inventories.

Dollar value of stocks in the hands of wholesale grocers at the end of March, 1948 was 1% higher than at the same date a year ago, but 5% below the value reported at the end of February. Stocks on hand at the beginning of March are normally 49% in excess of sales in that month. Wholesale grocers' inventories at the beginning of February this year were valued 23% in excess of sales.

## Wholesale Grocery Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		Jan.-to- Mar., 1948
		March, 1947	March, 1948	March, 1948 over March, 1947	Feb., 1948	Jan.-to- Mar., 1947
		\$	\$			
CANADA .....	78	26,048	27,131	+ 4.2	+11.9	+ 2.0
Maritime Provinces ...	16	3,502	3,740	+ 6.8	+20.2	+ 0.9
Quebec .....	20	2,968	2,890	- 2.6	+ 4.4	+ 0.3
Ontario .....	23	8,206	8,721	+ 6.3	+12.8	+ 0.2
Prairie Provinces ....	13	7,369	7,243	- 1.7	+ 9.9	- 1.4
British Columbia .....	6	4,003	4,538	+13.4	+13.2	+15.1

## Wholesale Fruit and Vegetable Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		Jan.,-to- March, 1948
		March, 1947	March, 1948	March, 1948 over March, 1947	Feb., 1948	Jan.,-to- March, 1947
		\$	\$			
CANADA .....	50	9,472	8,155	-13.9	+10.5	-10.8
Maritime and Quebec ..	19	2,299	1,952	-15.1	+ 0.5	- 7.9
Ontario .....	18	3,606	3,283	- 9.0	+14.9	- 8.3
Western Provinces ....	13	3,567	2,920	-18.1	+10.5	-15.1



### RETAIL TRADE

Chain Stores - March, 1948 sales of 977 chain store units operated by 24 chain companies in the food retailing field were 33% higher than sales of 967 stores operated by the same 24 firms in March, 1947. Average sales per store in March, 1948 were \$28,681, 32% above the \$21,799 average for the same month of the previous year.

Extensive gains were recorded in all sections of the country.

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

	March, 1947		March, 1948		% Change, In Sales March, 1948 March, 1947
	No. of Stores	Sales \$	No. of Stores	Sales \$	
CANADA .....	967	21,079,500	977	28,021,000	+32.9
Maritime Provinces .	73	863,800	72	1,086,300	+25.8
Quebec .....	162	4,496,600	162	5,931,900	+31.9
Ontario .....	468	10,949,700	473	15,210,500	+38.9
Prairie Provinces ..	125	2,554,600	125	2,966,500	+16.1
British Columbia ...	139	2,214,800	145	2,825,800	+27.6

Independent Stores - Independent food stores in Canada reported sales averaging 2% higher in March, 1948 than in March, 1947. Less than half of the reporting stores reported gains over March a year ago. A downward trend was in evidence in the Prairie Provinces, while elsewhere minor increases were experienced.

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

	No. of Stores Reporting	No. Reporting An Increase	% Change in Sales March, 1948 March, 1947
CANADA .....	1,130	549	+ 2.0
Maritime Provinces .	161	88	+ 4.3
Quebec .....	259	141	+ 4.0
Ontario .....	349	175	+ 2.9
Manitoba .....	81	34	- 2.2
Saskatchewan .....	68	13	- 8.1
Alberta .....	100	46	- 1.1
British Columbia ...	112	52	+ 0.4



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