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CURRENT TRENDS IN FOOD DISTRIBUTION

April, 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.

The wholesale grocery trade throughout Canada recorded considerably larger increases in sales over 1947 in April than have been recorded in preceding months, according to statements of 76 of the larger firms across the country. Sales for Canada averaged 14% above those in April, 1947 and 12% above March, 1948, whereas the cumulative gain for the year to date over the corresponding period last year was 5%.

Sales in Quebec and British Columbia were 24% above those for April a year ago. Wholesalers in the Prairie Province reported an increase of 14%; in Ontario, 10%; and in the Maritimes, 5%. In all regions, the April gains exceeded the increases in sales for the period from January to April, 1948 over the corresponding period of 1947.

Fruit and Vegetable Dealers' Sales

Dollar sales of fruit and vegetable wholesalers in April continued 11% below the 1947 level but showed an increase of 6% over March, 1948 sales. These figures are based on statements submitted by 47 of the larger dealers across Canada. The April decrease is in line with the decrease for the first four months of 1948 compared with the first four months of 1947 which amounted to 12%.

There was a considerable range in the decreases recorded for the various regions of the country. Fruit and vegetable sales in Ontario were only 2% below April, 1947; in the Maritimes and Quebec combined, they were down 7%; while in the Western Provinces, a drop of 21% was recorded. The only variation from the percentage decreases for the year to date occurred in Ontario where April sales were down only 2% compared with a drop of 7% for the first four months combined.

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Grocers' Inventories

There was a drop in value of stocks in the hands of wholesale grocers at the end of April, 1948 amounting to 2% compared with the same date a year ago and 5% compared with March 31, 1948. Stocks on hand at the beginning of April are normally 35% in excess of sales in that month. Wholesale grocers' inventories at the beginning of April this year were valued only 6% in excess of sales in that month.

Wholesale Grocery Trade by Economic Divisions

| Division | Number of firms reporting | Dollar Sales (add 000) | | Per cent change | | |
|----------------------|---------------------------|---------------------------|-------------|------------------------------|------------|--|
| | | April, 1947 | April, 1948 | April, 1948 over April, 1947 | March 1948 | Jan., -to- April, 1948 Jan., -to- April, 1947 |
| | | \$ | \$ | | | |
| CANADA | 76 | 25,275 | 29,548 | +13.8 | +11.9 | + 5.2 |
| Maritime Provinces . | 16 | 3,935 | 4,119 | + 4.7 | + 7.5 | + 1.9 |
| Quebec | 17 | 2,980 | 3,685 | +23.6 | +20.1 | + 8.5 |
| Ontario | 23 | 8,628 | 9,448 | + 9.5 | +13.1 | + 2.6 |
| Prairie Provinces .. | 14 | 6,505 | 7,431 | +14.2 | + 9.0 | + 2.4 |
| British Columbia ... | 6 | 3,927 | 4,865 | +23.9 | + 8.7 | +17.4 |

Wholesale Fruit and Vegetable Trade by Economic Divisions

| Division | Number of firms reporting | Dollar Sales (add 000) | | Per cent change | | |
|------------------------|---------------------------|---------------------------|-------------|------------------------------|------------|--|
| | | April, 1947 | April, 1948 | April, 1948 over April, 1947 | March 1948 | Jan., -to- April, 1948 Jan., -to- April, 1947 |
| | | \$ | \$ | | | |
| CANADA | 47 | 9,874 | 8,832 | -10.6 | + 5.9 | -11.6 |
| Maritimes and Quebec . | 16 | 2,007 | 1,860 | - 7.3 | +20.0 | - 7.7 |
| Ontario | 17 | 4,002 | 3,906 | - 2.4 | +21.0 | - 6.5 |
| Western Provinces ... | 14 | 3,865 | 3,066 | -20.7 | +11.7 | -19.2 |

RETAIL TRADE

Chain Stores - April, 1948 sales of 937 chain store units operated by 23 chain companies in the food retailing field were 30% higher than sales of 929 stores operated by the same 23 firms in April, 1947. Average sales per store in April, 1948 were \$29,578, 29% above the \$22,891 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 April, 1947 and 1948

| | April, 1947 | | April, 1948 | | % Change, In Sales April, 1948 April, 1947 |
|-----------------------|------------------|-------------|------------------|-------------|---|
| | No. of Stores | Sales \$ | No. of Stores | Sales \$ | |
| CANADA | 929 | 21,265,600 | 937 | 27,714,200 | +30.3 |
| Maritime Provinces .. | 61 | 759,600 | 60 | 981,300 | +29.2 |
| Quebec | 162 | 4,470,900 | 162 | 5,713,900 | +27.8 |
| Ontario | 481 | 11,709,300 | 484 | 13,166,700 | +29.5 |
| Prairie Provinces ... | 85 | 2,211,400 | 85 | 2,879,200 | +30.2 |
| British Columbia | 140 | 2,114,400 | 146 | 2,973,100 | +40.6 |

Independent Stores - Independent food stores did 8% more business in April 1948 than in the same month of last year. Ontario showed the largest increase of 12%, followed by gains of 9% in the Maritime Provinces and 8% in Quebec. Smaller gains were recorded in western Canada, ranging from 1% in Manitoba to 6% in Saskatchewan.

Comparison of Sales Reported for April, 1947 and 1948

| | No. of Stores Reporting | No. Reporting An Increase | % Change in Sales April, 1948 April, 1947 |
|-----------------------|-------------------------------|---------------------------------|---|
| CANADA | 1,107 | 685 | + 8.2 |
| Maritime Provinces .. | 157 | 101 | + 9.4 |
| Quebec | 252 | 165 | + 8.3 |
| Ontario | 351 | 241 | +11.8 |
| Manitoba | 87 | 39 | + 1.1 |
| Saskatchewan | 63 | 32 | + 6.0 |
| Alberta | 97 | 50 | + 8.8 |
| British Columbia | 100 | 57 | + 3.7 |

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