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CURRENT TRENDS IN FOOD DISTRIBUTION

May, 1948

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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 volume of sales of wholesale grocers in May, 1948 was 3% above that for the same month a year ago but 7% below the volume for April, 1948. These figures are based on returns for 76 of the larger firms across Canada. The cumulative gain for the first five months of 1948 over the corresponding period of 1947 was 5% for Canada as a whole. This increase varied between 2% and 5% for the provinces east of British Columbia and jumped to 16% for British Columbia.

Compared with May last year, sales in May, 1948 showed the greatest gain in the Prairie Provinces and British Columbia where the volume was 9% higher. An increase of 7% in dollar sales was recorded in the Maritime Provinces, while sales of wholesale grocers in Ontario and Quebec dropped 2% and 3% respectively.

Fruit and Vegetable Dealers' Sales.

A drop of 26% from May, 1947 in dollar sales of wholesale fruit and vegetable dealers was recorded from the combined statements of 50 of the larger wholesalers across the country. Compared with April, 1948, May sales were up 4%. Cumulative sales for the year 1948 to date were 15% lower than in the first five months of 1947.

All regions of the country registered decided declines in volume of fruit and vegetable sales. Sales in the Maritimes and Quebec combined were down 30%; Ontario, 23%; and the Western Provinces, 27%.

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Grocers' Inventories.

Stocks in the hands of wholesale grocers at May 31st were 2.5% lower in dollar value than at the same date a year ago and 5% below the value at the end of April this year. Inventories at the beginning of May are normally 26% in excess of sales in that month (based on the average of 1935 - 1942). Wholesale grocers' inventories at the beginning of May this year were value 8% 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		Jan., -to- May, 1948
		May, 1947	May, 1948	May, 1948 over May, 1947	April 1948	Jan., -to- May, 1947
		\$	\$			
CANADA	76	26,991	27,833	+ 3.1	- 7.0	+ 4.8
Maritime Provinces .	15	3,736	4,012	+ 7.4	- 2.7	+ 3.1
Quebec	21	4,020	3,896	- 3.1	- 9.0	+ 5.4
Ontario	23	8,918	8,713	- 2.3	- 6.8	+ 1.6
Prairie Provinces ..	11	6,446	7,001	+ 8.6	+ 1.9	+ 3.7
British Columbia ...	6	3,871	4,211	+ 8.8	-16.4	+15.7

Wholesale Fruit and Vegetable Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		Jan., -to- May, 1948
		May, 1947	May, 1948	May, 1948 over May, 1947	April 1948	Jan., -to- May, 1947
		\$	\$			
CANADA	50	12,150	8,956	-26.3	+ 4.1	-15.2
Maritimes and Quebec.	18	2,828	1,977	-30.1	-11.4	-13.4
Ontario	18	4,609	3,553	-22.9	-11.3	-10.6
Western Provinces ...	14	4,713	3,426	-27.3	+ 4.6	-20.8

RETAIL TRADE

Chain Stores - May, 1948 sales of 945 chain store units operated by 24 chain companies in the food retailing field were 25% higher than sales of 947 stores operated by the same 24 firms in May, 1947. Average sales per store in May, 1948 were \$31,109, 25% above the \$24,831 average for the same month of the previous year.

An increase of 34% in British Columbia featured the chain store results. Establishment of a number of new outlets has probably had some effect upon this result.

Comparison of Stores and Sales for May, 1947 and 1948

	May, 1947		May, 1948		% Change in Sales May, 1948 May, 1947
	No. of Stores	Sales \$	No. of Stores	Sales \$	
CANADA	947	23,514,900	945	29,398,300	+25.0
Maritime Provinces ...	60	895,500	58	1,051,100	+17.4
Quebec	162	5,072,700	154	6,089,300	+20.0
Ontario	488	12,609,200	489	16,053,000	+27.3
Prairie Provinces	98	2,659,200	98	3,148,200	+18.4
British Columbia	139	2,278,300	146	3,056,700	+34.2

Independent Stores - Independent food merchants reported little change in volume of sales from May last year. In Eastern Canada slight increases occurred, but in the Prairie Provinces and British Columbia minor declines prevailed.

Comparison of Sales Reported for May, 1947 and 1948

	No. of Stores Reporting	No. Reporting An Increase	% Change in Sales May, 1948 May, 1947
CANADA	1,136	546	+1.4
Maritime Provinces	165	73	+0.4
Quebec	260	133	+2.4
Ontario	359	183	+2.8
Manitoba	85	35	-1.2
Saskatchewan	62	25	-1.4
Alberta	97	47	-1.0
British Columbia	108	50	-0.3



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