

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

DEPARTMENT OF TRADE AND COMMERCE
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MERCHANDISING AND SERVICES STATISTICS
OTTAWA, CANADA

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Vol. 10 - No. 6	16-4050 13

AUG 1 9 1948

CURRENT TRENDS IN FOOD DISTRIBUTION

June, 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

Wholesale Grocers' Sales.

Sales of wholesale grocers in June, 1948 were 14% higher in dollar volume than in June, 1947 and the same percentage higher than in May, 1948, according to statements submitted by 72 of the larger firms across Canada. Cumulative sales for the first six months of 1948 showed an increase in volume of 7% over the first half of 1947. All regions reported increased sales volumes, with gains over June, 1947 ranging from 5% in Quebec to 25% in the Maritime Provinces.

Fruit and Vegetable Wholesalers' Sales.

Dollar volume of sales of fruit and vegetable dealers continued well below last year's level in June when the 48 firms submitting reports registered a decline of 19%. Compared with May, 1948, June sales were up 5%, while the cumulative total for the year to date was 16% lower than that for the first six months of 1947. Fruit and vegetable dealers in the Maritime Provinces reported sales 30% below last June; in British Columbia there was a drop of 25%; while a decline of 8% was registered in Ontario.

Grocers' Inventories.

Inventories of wholesale grocers at June 30, 1948 were 7% lower in value than at the same date a year ago and 4% below the end of May this year. Inventories at the beginning of June are normally 20% in excess of sales in that month (based on the average of 1935 - 1942), while at the beginning of June this year, they were 14% below the sales volume for that month.

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- June, 1948 Jan. -to- June, 1947
		June, 1947	June, 1948	June, 1948 over June, 1947	May, 1948	
		\$	\$			
CANADA	72	27,018	30,752	+13.8	+14.3	+ 6.6
Maritime Provinces	14	3,460	4,339	+25.4	+12.1	+ 6.8
Quebec	17	2,861	2,998	+ 4.8	+ 7.1	+ 5.3
Ontario	22	9,128	10,208	+11.8	+14.1	+ 3.7
Prairie Provinces.	13	7,149	8,333	+16.6	+11.4	+ 6.1
British Columbia .	6	4,420	4,874	+10.3	+23.5	+14.6

Wholesale Fruit and Vegetable Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		Jan. -to- June, 1948 Jan. -to- June, 1947
		June, 1947	June, 1948	June, 1948 over June, 1947	May, 1948	
		\$	\$			
CANADA	48	12,434	10,031	-19.3	+ 5.4	-16.0
Maritimes & Quebec.	15	2,498	1,743	-30.2	+ 1.9	-16.9
Ontario	19	4,856	4,465	- 8.0	+11.1	-10.1
Western Provinces..	14	5,080	3,823	-24.7	+ 4.4	-21.6

RETAIL TRADE

Chain Stores - June, 1948 sales of 953 chain store units operated by 24 chain companies in the food retailing field were 34% higher than sales of 960 stores operated by the same 24 firms in June, 1947. Average sales per store in June, 1948 were \$30,694, 35% above the \$22,681 average for the same month of the previous year.

Ontario and Quebec had the largest increases (36% and 35%), but gains elsewhere were also of sizeable proportions.

Comparison of Stores and Sales for June, 1947 and 1948

	June, 1947		June, 1948		% Change in Sales June, 1948 June, 1947
	No. of Stores	Sales \$	No. of Stores	Sales \$	
CANADA	960	21,773,400	953	29,251,000	+34.3
Maritime Provinces ...	73	915,100	72	1,167,800	+27.6
Quebec	161	4,626,100	155	6,256,600	+35.3
Ontario	478	11,485,900	475	15,648,100	+36.2
Prairie Provinces	107	2,503,900	104	3,220,600	+28.6
British Columbia	141	2,242,400	147	2,957,900	+31.9

Independent Stores - Independent stores did 13% more business in June this year than last. The largest increase of 17% was recorded in Ontario, followed by gains ranging from 4% to 15% in the other regions.

Comparison of Sales Reported for June, 1947 and 1948

	No. of Stores Reporting	No. Reporting An Increase	% Change in Sales June, 1948 June, 1947
CANADA	669	453	+12.5
Maritime Provinces	124	90	+11.6
Quebec	137	98	+14.0
Ontario	182	130	+16.6
Manitoba	51	30	+ 9.2
Saskatchewan	29	19	+14.5
Alberta	52	32	+ 9.2
British Columbia	94	54	+ 4.1



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