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CURRENT TRENDS IN FOOD DISTRIBUTION

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August, 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

Wholesale grocers' sales in August, 1948 were 17% higher in dollar volume than in August a year ago but fell off 1% from the July volume according to reports submitted by 72 of the larger establishments across Canada. Cumulative sales for the year to date exceeded those for the corresponding period of 1947 by 8%. Gains for the various regions of the country were fairly consistent, ranging between 11% shown in Quebec and 20% in British Columbia.

Fruit and Vegetable Dealers' Sales

August sales of fruit and vegetable wholesalers were 18% below the volume for August, 1947 and 1% lower than in July this year, with sales for the year to date 17% lower than in the first eight months of 1947. Decreases of 16% were reported for British Columbia and Ontario, while sales in the Maritime Provinces and Quebec combined were 27% lower than in August last year.

Grocers' Inventories

The value of inventories at the end of August, 1948, as reported by wholesale grocers, was 11% above that on the same date a year ago and 2% higher than at the end of July this year. Inventories at the beginning of August are normally 11% in excess of sales in that month (based on the average of 1935 - 1942), while stocks at the beginning of August this year were valued 10% lower than the sales volume for that month.

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Wholesale Grocery Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		
		August, 1947	August, 1948	August, 1948 over		Jan. - to-
				August, 1947	July, 1948	Aug., 1948
						Jan. - to-
						Aug., 1947
		\$	\$			
CANADA	72	27,387	31,973	+16.7	- 0.9	+ 8.4
Maritime Provinces	15	3,548	4,150	+17.0	- 4.0	+ 8.2
Quebec	17	3,098	3,442	+11.1	+ 6.2	+ 3.6
Ontario	21	8,770	10,332	+17.8	+ 1.4	+ 6.0
Prairie Provinces.	13	7,829	9,085	+16.0	- 4.4	+ 9.7
British Columbia .	6	4,142	4,964	+19.8	- 2.1	+15.9

Wholesale Fruit and Vegetable Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		Jan. - to- Aug., 1948
		August, 1947	August, 1948	August, 1948 over August, July,		
				1947	1948	
		\$	\$			
CANADA	48	12,601	10,333	-18.0	- 1.0	-17.3
Maritimes & Quebec	16	2,311	1,688	-27.0	-21.4	-18.8
Ontario	18	4,120	3,458	-16.1	-12.8	-12.0
Western Provinces.	14	6,170	5,187	-15.9	+19.0	-21.4

RETAIL TRADE

Chain Stores - August, 1948 sales of 978 chain store units operated by 26 chain companies in the food retailing field were 16% higher than sales of 976 stores operated by the same 26 firms in August, 1947. Average sales per store were \$28,611 in August, 1948 and \$24,650 in the same month of the previous year.

Increases in Quebec, Ontario and British Columbia compared favourably with the average result, but in the Maritime and Prairie Provinces, August sales rose only 7% and 8% respectively over August, 1947.

Comparison of Stores and Sales for August, 1947 and 1948

	August, 1947		August, 1948		% Change in Sales <u>August, 1948</u> <u>August, 1947</u>
	No. of Stores	Sales \$	No. of Stores	Sales \$	
CANADA	976	24,058,300	978	27,981,100	+16.3
Maritime Provinces	74	1,094,000	72	1,173,000	+ 7.3
Quebec	162	4,913,200	164	5,700,600	+16.0
Ontario	493	12,623,200	490	15,023,100	+19.0
Prairie Provinces	99	2,904,800	97	3,134,700	+ 7.9
British Columbia	148	2,523,100	155	2,949,700	+16.9

Independent Stores - Sales of independent food stores were 4% higher in August this year than in August, 1947. Saskatchewan showed a slight decline from August last year. In other sections of the country, moderate gains were reported, the highest being a 9% increase in Alberta.

Comparison of Sales Reported for August, 1947 and 1948

	No. of Stores Reporting	No. Reporting An Increase	% Change in Sales <u>August, 1948</u> <u>August, 1947</u>
CANADA	779	367	+ 3.5
Maritime Provinces	133	62	+ 1.1
Quebec	180	92	+ 6.7
Ontario	202	85	+ 3.1
Manitoba	49	24	+ 3.4
Saskatchewan	34	13	- 0.7
Alberta	64	39	+ 8.5
British Columbia	117	52	+ 0.4



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