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CURRENT TRENDS IN FOOD DISTRIBUTION

NOV 18 1948

September, 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 dollar volume of sales of wholesale grocers in September, 1948 was 9% in excess of September, 1947 and 5% higher than in August, 1948, according to statements from 74 of the larger wholesalers across the country. The September gain was in line with that shown by the cumulative figure for the year to date which was 8.5% above the corresponding period of 1947. Increases over 1947 in the Prairie Provinces and in Ontario amounted to 15 and 11% respectively while lesser gains of between 2 and 6% were recorded in the other regions.

Fruit and Vegetable Dealers' Sales

September sales of fruit and vegetable wholesalers in Canada were only 2% below the September, 1947 figure and were 10% above August, 1948. Cumulative sales for the first nine months of 1948 were 16% below the dollar volume in the corresponding period of 1947. Fruit and vegetable wholesalers' sales in the Western Provinces rose 7% above the September, 1947 volume but this gain was offset by decreases of 20% in the Maritimes and Quebec combined and 8% in Ontario.

Grocers' Inventories

Stocks in the hands of wholesale grocers at the end of September were 16% higher in value than at the same date a year ago and 11% higher than at the beginning of the month. Inventories at the beginning of September are normally 10% in excess of sales in that month (based on the average of 1935-1942), while stocks at the beginning of September this year were 13% 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		Jan. -to-
		September, 1947	September, 1948	September, 1948 over September, 1947	August, 1948	Sept., 1948
		\$	\$			Jan. -to- Sept., 1947
CANADA	74	31,256	34,066	+ 9.0	+ 4.6	+ 8.5
Maritime Provinces	14	4,021	4,122	+ 2.5	- 2.9	+ 7.5
Quebec	19	4,494	4,682	+ 4.2	+18.7	+ 3.8
Ontario	23	10,066	11,135	+10.6	+ 1.0	+ 6.6
Prairie Provinces.	12	7,962	9,126	+14.6	+ 6.4	+10.4
British Columbia .	6	4,713	5,001	+ 6.1	+ 6.5	+14.6

Wholesale Fruit and Vegetable Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		Jan. -to-
		September, 1947	September, 1948	September, 1948 over September, 1947	August, 1948	Sept., 1948
		\$	\$			Jan. -to- Sept., 1947
CANADA	49	11,804	11,548	- 2.2	+ 9.6	-15.7
Maritimes & Quebec	16	2,035	1,634	-19.7	+ 1.8	-18.7
Ontario	19	3,700	3,394	- 8.3	+ 3.5	-11.8
Western Provinces.	14	6,069	6,520	+ 7.4	+20.0	-17.6

RETAIL TRADE

Chain Stores - September, 1948 sales of 964 chain store units operated by 26 chain companies in the food retailing field were 24% higher than sales of 965 stores operated by the same 26 firms in September, 1947. Average sales per store were \$30,515 in September, 1948 and \$24,632 in the same month of the previous year.

Increases amounted to more than 20% in all sections of the country except the Maritime Provinces where the gain was held to 7%.

Comparison of Stores and Sales for September, 1947 and 1948

	September, 1947		September, 1948		% Change in Sales <u>September, 1948</u> <u>September, 1947</u>
	No. of Stores	Sales	No. of Stores	Sales	
		\$		\$	
CANADA	965	23,770,200	964	29,416,000	+23.8
Maritime Provinces	55	922,700	53	986,200	+ 6.9
Quebec	162	5,045,900	158	6,255,600	+24.0
Ontario	494	12,517,400	493	15,811,700	+26.3
Prairie Provinces	106	2,794,600	105	3,354,900	+20.1
British Columbia	148	2,489,600	155	3,007,600	+20.8

Independent Stores - Sales of independent food stores were 7% higher in September this year than in September, 1947.

Comparison of Sales Reported for September, 1947 and 1948

	No. of Stores Reporting	No. Reporting An Increase	% Change in Sales <u>September, 1948</u> <u>September, 1947</u>
CANADA	827	498	+ 7.4
Maritime Provinces	143	89	+ 5.2
Quebec	194	117	+ 9.5
Ontario	215	125	+ 6.3
Manitoba	55	37	+12.8
Saskatchewan	39	28	+12.7
Alberta	62	45	+10.2
British Columbia	119	57	+ 3.5



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