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CURRENT TRENDS IN FOOD DISTRIBUTIONFebruary, 1949

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 TRADEGrocers' Sales

Dollar volume of wholesale grocers' sales was 4% higher in February, 1949 than in February, 1948 and 3% lower than in January, 1949 according to reports submitted by 75 of the larger wholesalers across Canada. The Province of Quebec, with sales down 12%, was the only region to record a decline in sales volume from last year. Grocery wholesalers in the Maritime Provinces reported sales 2% above February last year. Sales in Ontario and in British Columbia were up 7% and in the Prairie Provinces, 9%.

Fruit and Vegetable Wholesalers' Sales

Dollar sales in the wholesale fruit and vegetable trade in February were 4% above February a year ago and 10% higher than in January according to statements from 49 of the larger dealers across the country. The Maritime Provinces and Quebec combined registered a decline in dollar volume from last year of 4%. Sales in Ontario were 3% in excess of the volume a year ago and in British Columbia were up 10%.

Grocers' Stocks

Wholesale grocers' inventories at the end of February, 1949 were valued 7% higher than at the same date in 1948 and 5% lower than at the end of January, 1949. Inventories at the beginning of February are normally 66% in excess of sales in that month (based on the average of 1935-1942). Stocks at the beginning of February this year were almost at the normal ratio to sales, being 62% higher in value than sales in that month.

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Wholesale Grocery Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change	
		February, 1948	February, 1949	February, 1949 over February, 1948	January, 1949
		\$	\$		
CANADA .....	75	24,030	25,014	+ 4.1	- 2.5
Maritime Provinces	15	3,205	3,276	+ 2.2	- 1.5
Quebec .....	20	3,698	3,245	-12.3	+11.6
Ontario .....	21	7,523	8,063	+ 7.2	- 7.6
Prairie Provinces.	12	5,920	6,477	+ 9.4	+ 1.7
British Columbia .	7	3,684	3,953	+ 7.3	- 8.8

Wholesale Fruit and Vegetable Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change	
		February, 1948	February, 1949	February, 1949 over February, 1948	January, 1949
		\$	\$		
CANADA .....	49	7,266	7,545	+ 3.8	+ 0.7
Maritimes & Quebec.	18	1,728	1,653	- 4.4	+17.7
Ontario .....	18	2,915	2,999	+ 2.9	- 8.2
Western Provinces .	13	2,623	2,893	+10.3	+ 4.4

# RETAIL TRADE

Due to a change in the method of computing retail sales estimates the summary appearing below includes grocery, and grocery and combination stores, but does not give representation to meat markets.

Chain Stores - February, 1949 sales of 914 chain store units operated by 20 chain companies in the food retailing field were 13% higher than sales of 919 stores operated by the same 20 firms in February, 1948. Average sales per store were \$31,934 in February, 1949 and \$28,102 in the same month of the previous year.

A gain of 23% in British Columbia featured the regional changes in sales. The Maritime Provinces' increase of 6% was quite moderate in comparison with results for other sections of the country.

## Comparison of Stores and Sales for February, 1948 and 1949.

	February, 1948		February, 1949		% Change in Sales
	No. of Stores	Sales	No. of Stores	Sales	February, 1949 February, 1948
		\$		\$	
CANADA.....	919	25,825,900	914	29,187,800	+13.0
Maritime Provinces .....	59	929,600	54	982,100	+ 5.6
Quebec .....	161	5,491,200	159	6,317,300	+15.0
Ontario .....	466	14,355,100	463	15,879,400	+10.6
Prairie Provinces .....	108	2,606,100	104	3,011,500	+15.6
British Columbia .....	125	2,443,900	134	2,997,500	+22.7

Independent Stores - Sales of Independent food stores increased 8% in February, 1949 compared with February, 1948. Provincial increases are shown in the following table.

## Comparison of Sales Reported for February, 1948 and 1949

	No. of Stores Reporting	No. Reporting An Increase	% Change in Sales February, 1949 February, 1948
CANADA .....	664	415	+ 8.0
Maritime Provinces .....	134	78	+ 0.5
Quebec .....	157	86	+ 7.3
Ontario .....	171	108	+ 9.9
Manitoba .....	48	36	+ 9.6
Saskatchewan .....	23	18	+11.8
Alberta .....	49	39	+24.8
British Columbia .....	82	50	+ 2.8

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