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CURRENT TRENDS IN FOOD DISTRIBUTION

March, 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 TRADE

Grocers' Sales

Wholesale grocers' sales in March, 1949 were 7% higher in dollar volume than in March a year ago and were 14% above the February, 1949 volume according to statements from 77 of the larger wholesalers across Canada. Cumulative sales for the first quarter of 1949 exceeded the dollar volume for the corresponding period of 1948 by 4%. Quebec, with a decrease of 4%, was the only province to register a drop in sales from March a year ago. Cumulative sales for the year to date for this province were 7% below the sales in the first three months of 1948. Other regions registered gains as follows: British Columbia, 4%; the Maritime Provinces, 6%; Ontario, 8%; and the Prairie Provinces, 12%.

Fruit and Vegetable Dealers' Sales

Dollar sales of fruit and vegetable wholesalers showed an increase of 18% over March, 1948 and 21% over February, 1949, bringing the sales for the year to date to 10% in excess of the sales volume in the corresponding period of 1948. Ontario dealers reported an increase of 15%, while gains of 19% and 21% were registered in the Maritime Provinces and the Western Provinces respectively.

Grocers' Inventories

Dollar value of stocks in the hands of wholesale grocers at the end of March was 3% higher than at the same date a year ago but 10% below the value reported for the end of February. Stocks on hand at the beginning of March are normally 49% in excess of sales in that month (based on the average for 1936 - 1942). Wholesale grocers' inventories at the beginning of March this year were valued 23% in excess of 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		
		March, 1948	March, 1949	March, 1949 over March, February, 1948 1949		Jan. -to- Mar., 1949
		\$	\$			Jan. -to- Mar., 1948
CANADA	77	26,302	28,121	+ 6.9	+14.3	+ 3.9
Maritime Provinces ..	16	3,778	3,993	+ 5.7	+24.6	+ 2.7
Quebec	19	2,938	2,826	- 3.8	+14.9	- 7.4
Ontario	22	8,688	9,407	+ 8.3	+12.9	+ 5.6
Prairie Provinces ...	12	6,676	7,499	+12.3	+12.5	+ 7.5
British Columbia	8	4,222	4,396	+ 4.1	+ 9.8	+ 5.8

Wholesale Fruit and Vegetable Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		
		March, 1948	March, 1949	March, 1949 over March, February, 1948 1949		Jan.,-to- March,1949
		\$	\$			Jan.,-to- March,1948
CANADA	47	7,966	9,404	+18.1	+21.1	+10.2
Maritimes and Quebec .	17	1,748	2,082	+19.1	+21.5	+ 8.0
Ontario	17	3,256	3,753	+15.3	+31.0	+ 8.0
Western Provinces ...	13	2,962	3,569	+20.5	+ 7.0	+14.0

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 for which separate sales estimates are available.

Chain Stores - March, 1949 sales of 961 chain store units operated by 23 chain companies in the food retailing field were 14% higher than sales of 978 stores operated by the same 23 firms in March, 1948. Average sales per store were \$33,878 in March, 1949 and \$29,129 in the same month of the previous year.

Comparison of Stores and Sales for March, 1948 and 1949.

	March, 1948		March, 1949		% Change in Sales March, 1949 March, 1948
	No. of Stores	Sales \$	No. of Stores	Sales \$	
CANADA	978	28,488,000	961	32,556,400	+14.3
Maritime Provinces	72	1,088,100	68	1,209,500	+11.2
Quebec	162	5,931,900	159	7,313,200	+23.3
Ontario	468	15,411,600	462	16,894,900	+ 9.6
Prairie Provinces	115	2,986,900	111	3,545,800	+18.7
British Columbia	161	3,069,500	161	3,593,000	+17.1

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

Comparison of Sales Reported for March, 1948 and 1949

	No. of Stores Reporting	No. Reporting An Increase	% Change in Sales March, 1949 March, 1948
CANADA	677	423	+ 7.9
Maritime Provinces	139	80	+ 1.1
Quebec	165	83	+ 2.6
Ontario	171	113	+12.3
Manitoba	42	30	+12.0
Saskatchewan	26	21	+16.6
Alberta	47	42	+24.3
British Columbia	87	54	+ 7.0

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