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CURRENT TRENDS IN FOOD DISTRIBUTION, JULY, 1940

Introduction

Indexes reflecting current trends in food distribution in Canada have been published for some years, indexes of retail and wholesale grocery trading establishments forming components of the two regular monthly bulletins on retail and wholesale trade issued by the Internal Trade Branch of the Dominion Bureau of Statistics. This series brings together in one report the information on retail and wholesale grocery sales contained in the other bulletins thus facilitating a comparison of the trends in monthly sales in the two stages of food distribution.

Wholesale Trade

Sales of 77 wholesale grocery houses were unchanged in July, 1940, from July, 1939, but were 8 per cent lower than the level of June, 1940, unadjusted indexes on the base, 1930 = 100, standing at 112.1 for July, 1940; 122.0 for June, 1940; 135.0 for May, 1940; and 112.3 for July, 1939. In all months in 1940 previous to July, increases were recorded over the corresponding months of 1939. In June, the margin was 9 per cent, in May, 25 per cent, and in April, 14 per cent. Dollar value of sales for the first seven months of this year averaged 13 per cent higher than for the corresponding seven-month period of 1939.

Indexes of Sales, 1930 = 100

	1940			1939
	July	June	May	July
Unadjusted index	112.1	122.0	135.0	112.3
Seasonally adjusted index	98.8	119.6	137.2	98.9

The trends in the five economic divisions of the country were widely varied and ranged from an increase in sales of 11 per cent in the Maritime Provinces to a decrease of 7 per cent in British Columbia. Quebec reported a gain of 9 per cent, Ontario 1 per cent, while the Prairie Provinces were down 6 per cent from July a year ago.

Percentage Change in Wholesale Sales, by Provinces

	July Dollar Sales Per cent change from		Year to date <u>1940</u> 1939	Number of Firms Reporting
	July 1939	June 1940		
CANADA	- 0.2	- 8.1	+ 12.8	77
Maritimes	+ 10.9	+ 1.8	+ 19.0	15
Quebec	+ 8.7	- 3.6	+ 16.9	22
Ontario	+ 1.0	- 14.2	+ 11.0	21
Prairies	- 6.3	- 6.9	+ 11.7	13
British Columbia ...	- 7.0	- 7.9	+ 10.3	6

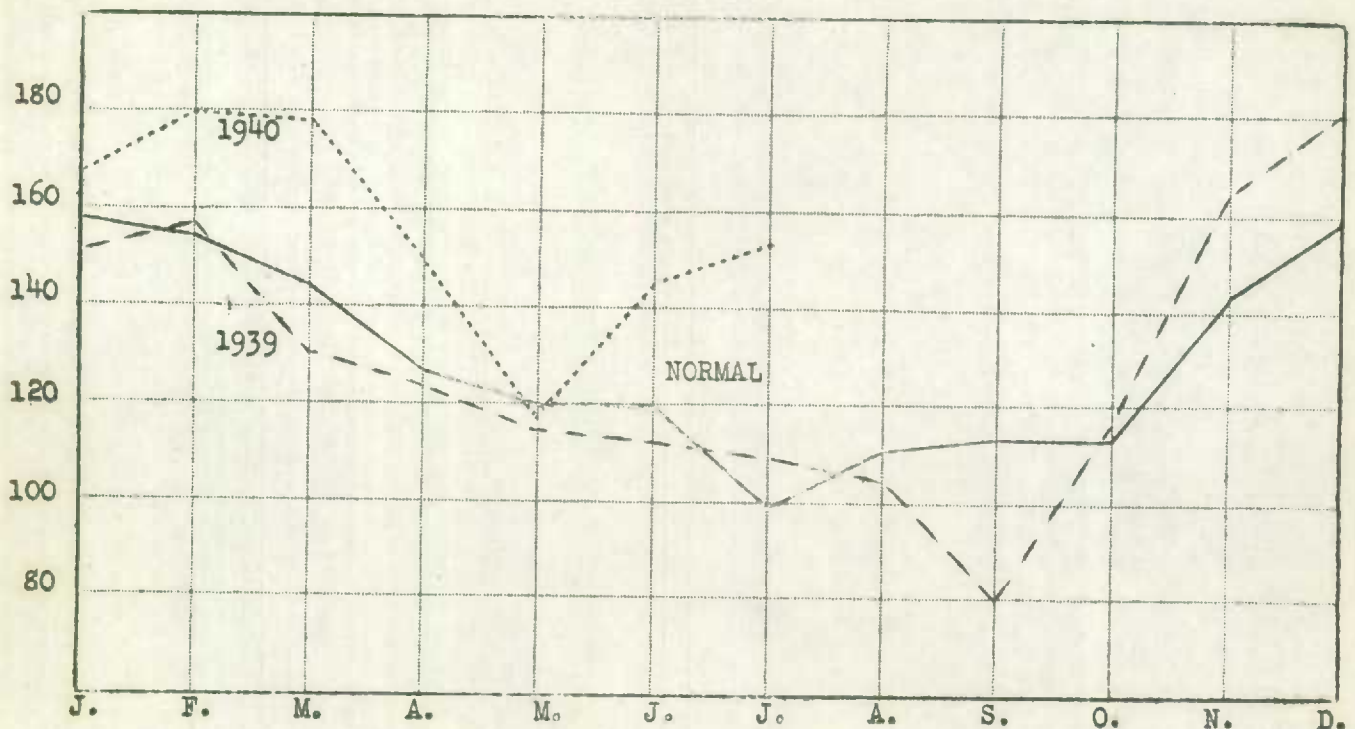
Stocks

Inventories carried by the wholesale grocery trade were 24 per cent higher at the end of July than on the corresponding date of 1939, but were 7 per cent lower than at the end of June, 1940. Stocks on hand at any period must be considered in relation to sales in the immediately following period. Stocks on hand at the beginning of July are normally equal to the July turnover. The rates of stocks on hand at the end of June formed 152 per cent of the July sales, indicating that stocks on hand at the beginning of the month were greatly in excess of the normal inventory position for that time of year.

Wholesale Grocery Trade:--Percentage that Stocks on Hand
at Beginning of Month bear to Sales during Month

(Normal = Average for 1935, 1936)

Per cent



Retail Trade

Chain Stores

Sales of 1,081 chain store units operated by 26 chain companies in the food retailing field averaged 23 per cent higher in July, 1940, than the sales of 1,253 units operated by the same 26 firms in the corresponding month of 1939. Chain sales in the province of British Columbia were up 35 per cent; Ontario, 23 per cent; Quebec, 21 per cent; and the Prairie Provinces, 19 per cent. Average daily sales for grocery and meat chains were 19 per cent higher in July, 1940, than in July, 1939.

Comparison of Stores and Sales for July, 1939 and 1940

26 Chain Companies

	JULY, 1939		JULY, 1940		Per cent change in Sales
	No. Stores	Sales	No. Stores	Sales	
		\$		\$	
CANADA	1,253	7,445,967	1,081	9,154,520	+ 22.9
Quebec	252	1,507,662	209	1,823,168	+ 20.9
Ontario	732	4,340,706	633	5,332,570	+ 22.9
Prairie Provinces	156	973,851	141	1,155,809	+ 18.7
British Columbia	113	623,748	98	842,973	+ 35.1

Independent Stores

Dollar sales of 1,035 independent grocery and combination stores were 5 per cent higher in July, 1940, compared with July, 1939. Results on a geographical basis indicate that sales increases were recorded in every section of the country, ranging from a gain of 11 per cent in Manitoba to one of 3 per cent in Quebec. The Maritimes reported an increase of 7 per cent, British Columbia, 6 per cent; and Alberta, 5 per cent. Saskatchewan and Ontario were the same with a gain of 4 per cent over July, 1939.

Comparison of Sales Reported for July, 1939 and 1940

	No. stores reporting	No. reporting increase	Per Cent change in sales
Maritimes	154	105	+ 7.1
Quebec	220	117	+ 2.9
Ontario	401	253	+ 4.0
Manitoba	68	56	+ 10.8
Saskatchewan	42	27	+ 3.5
Alberta	63	41	+ 4.7
British Columbia	87	46	+ 5.5
CANADA	1,035	645	+ 4.7



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