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CURRENT TRENDS IN FOOD DISTRIBUTION, NOVEMBER, 1942

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

November sales of wholesale grocery firms increased by 3 per cent over November, 1941, according to reports received from 71 of the larger establishments but declined 14 per cent from the dollar volume of business transacted during October, 1942. Cumulative figures for the first eleven months of the current year stand 8 per cent higher than for the corresponding period last year. Grocery wholesalers in Ontario reported a 10 per cent increase in sales over November last year while the Maritimes recorded a gain of 6 per cent. Sales in Quebec and the Prairies remained unchanged while British Columbia sales were down by 9 per cent.

Inventories held by wholesale grocers at the end of November, 1942, were valued 13 per cent lower than on the corresponding date of last year, but increased by 6 per cent over the value of stocks reported on hand on October 31, 1942. Stocks on hand at the beginning of November are normally 45 per cent in excess of the amount of business transacted in that month. Stocks on hand at the beginning of November this year were 26 per cent in excess of the volume of business transacted, indicating that the stock position at the beginning of November, 1942, was below the normal position for that period of the year.

Wholesale Grocery Trade by Economic Divisions

Division	Number of firms re- porting	Dollar Sales (add 000)		Per cent change		Year to date 1942 1941
		November 1941 \$	November 1942 \$	November, 1941	November, 1942 over October 1942	
CANADA	71	16,615	17,150	+ 5.2	-13.6	+ 8.1
Maritimes	15	2,063	2,190	+ 6.2	- 5.6	+ 9.8
Quebec	22	3,195	3,206	+ 0.3	-11.9	+ 7.0
Ontario	19	4,980	5,498	+10.4	-12.3	+10.1
Prairies	10	4,370	4,889	+10.4	-17.2	+ 6.0
British Columbia ..	5	1,507	1,367	- 9.3	-19.4	+ 7.3

Retail Trade

Chain Stores

Sales of 949 chain store units operated by 25 chain companies in the food retailing field averaged 9 per cent lower in November, 1942, than sales of 990 units operated by the same 25 firms in November a year ago. Average sales per store were \$13,109 in November, 1942, 5 per cent lower than the \$13,783 average for the same month of 1941. There was one more Saturday in November, 1941, than in November, 1942, and when adjustment was made to allow for this factor, the decline below November, 1941, was only 2 per cent.

Sales decreased by 1 per cent in the Prairie Provinces, 2 per cent in British Columbia, 9 per cent in Quebec, and 12 per cent in Ontario below November, 1941.

Comparison of Stores and Sales for November, 1941 and 1942

	November, 1941		November, 1942		Per cent Change in sales
	No. Stores	Sales	No. Stores	Sales	
		\$		\$	
CANADA	990	13,645,230	949	12,440,652	- 8.8
Quebec	195	2,858,506	181	2,591,216	- 9.4
Ontario	549	7,791,577	528	6,992,716	- 11.5
Prairie Provinces.	149	1,689,754	145	1,674,349	- 0.9
British Columbia .	97	1,305,393	95	1,282,371	- 1.8

Independent Stores

Sales of 887 independent grocery or grocery and meat stores averaged 9 per cent higher in November of this year than last, all regions of the country except Saskatchewan contributing to the increase. Sales in Saskatchewan declined by 7 per cent from the dollar volume of business transacted in November, 1941. Gains recorded for the other regions of the country are as follows: Maritimes, 6 per cent; Quebec, 15 per cent; Ontario, 9 per cent; Manitoba, 3 per cent. Alberta, 5 per cent; British Columbia, 10 per cent.

Comparison of Sales Reported for November, 1941 and 1942

	No. stores reporting	No. reporting increase	Per cent change in sales
CANADA	887	615	+ 9.0
Maritimes	125	80	+ 6.1
Quebec	194	149	+ 15.1
Ontario	348	237	+ 8.5
Manitoba	65	45	+ 3.1
Saskatchewan	33	20	- 7.1
Alberta	52	32	+ 5.0
British Columbia	70	52	+ 9.8

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