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CURRENT TRENDS IN FOOD DISTRIBUTION, DECEMBER, 1944

Indexes reflecting current trends in food distribution in Canada have been published for some years, indexes of retail and wholesale grocery sales forming components of the two regular monthly bulletins on retail and wholesale trade issued by the Merchandising and Services 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

December sales transacted by 74 of the larger grocery wholesale establishments in Canada increased 5 per cent over the volume of business reported in December, 1943, but were 12 per cent below the dollar business realized in November, 1944. Total sales for the year 1944 increased 13 per cent over the 1943 level of trading. Increases in the annual comparison were fairly uniform for all regions of the country, gains ranging from 10 per cent in the Prairie Provinces and British Columbia to 13 per cent in Ontario.

The December increase over December, 1943 was shared by all regions of the country except the Prairie Provinces where sales declined by 8 per cent. Increases on a regional basis are as follows: Maritime Provinces, 5 per cent; Quebec, 7 per cent; Ontario, 10 per cent; British Columbia, 13 per cent.

Inventories held at the end of December, 1944 were valued 2 per cent lower than the stocks on hand at the end of December, 1943, but exceeded by 4 per cent the value of inventories in the hands of wholesale grocers on November 30, 1944. Stocks at the beginning of December are normally 64 per cent in excess of the volume of business transacted in that month as reflected in the average experience over the years 1935 to 1942. Stocks at the beginning of December, 1944, were 15 per cent in excess of the volume of business transacted, indicating that the inventory position at the beginning of December, 1944 had dropped considerably below the normal position for that period of the year.

Wholesale Grocery Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		Year-to- date, 1944
		December, 1943	December, 1944	December, 1943	December, 1944 over November, 1943	Year-to- date, 1943
		\$	\$			
CANADA	74	18,876	19,785	+ 4.8	-12.1	+12.5
Maritimes	14	2,398	2,525	+ 5.3	-15.1	+11.9
Quebec	22	2,901	3,095	+ 6.7	-36.1	+10.6
Ontario	20	5,609	6,168	+10.0	- 6.7	+13.0
Prairies	12	5,429	4,996	- 8.0	-25.6	+10.2
British Columbia	6	2,539	3,001	+18.2	- 0.5	+ 9.9

Retail Sales

Chain Stores

Sales of 922 chain store units operated by 27 chain companies in the food retailing field averaged 17 per cent higher in December, 1944, than sales of 938 units operated by the same 27 firms in December a year ago. Average sales per store were \$18,853 in December, 1944, 19 per cent higher than the \$15,872 average for the same month of 1943.

Sales increased by 23 per cent in Quebec, 15 per cent in Ontario, 17 per cent in the Prairie Provinces and 16 per cent in British Columbia.

Comparison of Stores and Sales for December, 1943 and 1944

	December, 1943		December, 1944		Per cent change in sales
	No. Stores	Sales	No. Stores	Sales	
		\$		\$	
CANADA	938	14,887,827	922	17,382,496	+16.8
Quebec	174	3,067,475	170	3,760,910	+22.6
Ontario	523	8,438,671	517	9,688,354	+14.8
Prairie Provinces	147	1,973,101	142	2,300,444	+16.6
British Columbia	94	1,408,580	93	1,632,788	+15.9

Independent Stores

Independent grocery and combination stores reported sales 6 per cent higher in December, 1944 compared with December, 1943. Increases in most section of the country approximated the average result. The only marked deviations occurred in British Columbia and Saskatchewan where sales were up 13 and 10 per cent respectively over December, 1943.

Comparison of Sales Reported for December, 1943 and 1944

	No. stores reporting	No. reporting increase	Per cent change in sales
CANADA	969	870	+ 5.8
Maritimes	167	124	+ 7.8
Quebec	210	139	+ 4.8
Ontario	336	228	+ 4.6
Manitoba	77	46	+ 8.6
Saskatchewan	34	27	+10.2
Alberta	76	50	+ 4.3
British Columbia	63	56	+12.8

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