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CURRENT TRENDS IN FOOD DISTRIBUTION, JULY, 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

Wholesale grocery sales were 6 per cent higher in July of this year than last, according to reports received from 80 of the larger wholesale grocery establishments in Canada, but the July volume of trading declined 5 per cent from the June, 1944 level. Results on a regional basis varied greatly, increases over July, 1943, ranging from 3 per cent in Quebec and British Columbia to 12 per cent in the Prairie Provinces. Aggregate totals for the January-July period of this year stand 10 per cent higher than for the same period of last year.

Stocks in the hands of wholesale grocers were valued 15 per cent greater at the end of July this year than on the same date of 1943, but the July month-end inventory was 1 per cent below the June level. Stocks at the beginning of July are normally 7 per cent in excess of the volume of business transacted during that month. Stocks at the beginning of July this year exceeded sales transacted during the month by 3 per cent, indicating that the inventory situation at the beginning of July was below the normal level for that period of the year.

Wholesale Grocery Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		
		July, 1943	July, 1944	July, 1944 over July, 1943		Year-to- date, 1944
		\$	\$	1943	June, 1944	Year-to- date, 1943
CANADA	80	19,378	20,628	+ 6.4	- 5.2	+10.1
Maritimes	17	2,589	2,751	+ 6.2	- 6.7	+14.4
Quebec	23	3,051	3,140	+ 2.9	- 4.7	+ 5.1
Ontario	22	5,968	6,270	+ 5.1	- 6.8	+ 1.4
Prairies	12	5,276	5,908	+12.0	+ 0.1	+13.7
British Columbia	6	2,494	2,559	+ 2.6	-12.6	+10.7

Retail Sales

Chain Stores

Sales of 925 chain store units operated by 25 chain companies in the food retailing field averaged 3 per cent lower in July, 1944, than sales of 936 units operated by the same 25 firms in July a year ago. Average sales per store were \$14,629 in July, 1944, 2 per cent lower than the \$14,953 average for the same month of 1943.

Sales decreased by 1 per cent in Quebec, 3 per cent in Ontario, 4 per cent in the Prairie Provinces and 8 per cent in British Columbia.

Comparison of Stores and Sales for July, 1943 and 1944

	July, 1943		July, 1944		Per cent change in sales
	No. Stores	Sales	No. Stores	Sales	
		\$		\$	
CANADA	936	13,996,038	925	13,531,466	- 3.3
Quebec	174	2,816,087	171	2,787,120	- 1.0
Ontario	521	7,696,938	516	7,467,458	- 3.0
Prairie Provinces	147	2,048,859	144	1,960,491	- 4.3
British Columbia	94	1,434,154	94	1,316,397	- 8.2

Independent Stores

Sales of 938 independent grocery or grocery and meat stores decreased by 3 per cent in dollar volume in July, 1944, from the value of business transacted in the same month of last year. The following decreases below July, 1943 were recorded for various provinces: Maritimes and Quebec, 2 per cent; Ontario, 6 per cent, Manitoba, 7 per cent; Saskatchewan and British Columbia, 1 per cent. An increase of 2 per cent was recorded in Alberta.

Comparison of Sales Reported for July, 1943 and 1944

	No. stores reporting	No. reporting increase	Per cent change in sales
CANADA	938	390	- 3.3
Maritimes	157	73	- 2.0
Quebec	208	97	- 1.6
Ontario	329	111	- 6.0
Manitoba	72	25	- 6.6
Saskatchewan	32	15	- 1.0
Alberta	71	35	+ 1.8
British Columbia	69	34	- 1.0

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