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CURRENT TRENDS IN FOOD DISTRIBUTION, NOVEMBER, 1945

Indexes reflecting current trends in food distribution in Canada have been published for some years, indexes of retail grocery and wholesale grocery and fruits and vegetables 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 grocery and wholesale grocery and fruit and vegetable 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 wholesale grocery sales were 6 per cent greater in 1945 than in 1944, but fell 4 per cent below the volume of business transacted in October, 1945. These data are based on returns from 73 of the larger wholesale grocery establishments in Canada. The 6 per cent gain was not shared by all regions of the country. Grocery sales in Quebec declined 5 per cent from the November, 1944 level while the Maritime Provinces registered a minor increase of 1 per cent. Ontario and the Prairie Provinces each reported a gain of 8 per cent and British Columbia sales were up 15 per cent. Cumulative sales transacted in the January-November period of 1945 stand 6 per cent above the dollar business reported in the same months of 1944.

The dollar value of fruit and vegetable sales advanced 31 per cent between November, 1945 and 1944, but November sales were valued 6 per cent lower than the October volume of trading. Sales were up 28 per cent in the Maritime Provinces and Quebec, 47 per cent in Ontario, and 17 per cent in British Columbia. Fruit and vegetable sales were 17 per cent higher in the first eleven months of 1945 than in 1944.

Wholesale grocery stocks were valued 11 per cent lower at the end of November, 1945 than on the same date of the previous year, but inventories increased 5 per cent over the stocks on hand at the end of October, 1945. Inventories at the beginning of November are normally 43 per cent in excess of the business transacted during that month. Stocks on hand at the beginning of November, 1945, were 14 per cent below the volume of November sales, indicating that the inventory position at the beginning of November was considerably below the normal situation 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, 1945
		November, 1944	November, 1945	November, 1944	1945 over October, 1945	
		\$	\$			Year-to- date, 1944
CANADA	73	21,559	22,767	+ 5.6	- 3.7	+ 6.4
Maritimes	16	3,010	3,038	+ 0.9	- 4.2	+ 6.9
Quebec	21	3,730	3,561	- 4.5	- 6.3	+ 3.7
Ontario	20	6,661	7,185	+ 7.9	- 1.3	+ 7.6
Prairies	11	5,468	5,896	+ 7.8	- 3.9	+ 5.0
British Columbia ...	5	2,690	3,087	+14.8	- 2.3	+12.0

Wholesale Fruit and Vegetable Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		Year-to- date, 1945
		November, 1944	November, 1945	November, 1944	1945 over October, 1945	
		\$	\$			Year-to- date, 1944
CANADA	45	7,384	9,660	+30.8	- 6.1	+17.0
Maritimes and Quebec	14	1,599	2,048	+28.1	- 0.6	+16.9
Ontario	18	2,797	4,122	+47.4	+ 4.7	+20.3
Western Provinces ..	13	2,988	3,490	+16.8	-12.7	+14.2

Retail Sales
Chain Stores

November, 1945 sales of 930 chain store units operated by 28 chain companies in the food retailing field were 11 per cent higher than sales of 960 stores operated by the same 28 firms in November, 1944. Average sales per store in November, 1945 were \$17,744, 14 per cent above the \$15,513 average for the same month of the previous year.

Quebec stores, with a gain of 15 per cent, showed the greatest expansion in business between November of the two years. A 9 per cent increase in Ontario was the lowest among those recorded for various regions. Results for other regions conformed closely with the average increase.

Comparison of Stores and Sales for November, 1944 and 1945

	November, 1944		November, 1945		% Change In Sales November, 1945 November, 1944
	No. of Stores	Sales \$	No. of Stores	Sales \$	
CANADA	960	14,892,152	930	16,501,463	+10.8
Maritimes	41	478,302	40	526,117	+10.0
Quebec	171	3,020,434	165	3,457,640	+14.5
Ontario	516	8,131,626	497	8,842,645	+ 8.7
Prairie Provinces	139	1,933,800	136	2,175,865	+12.5
British Columbia.	93	1,327,990	92	1,499,196	+12.9

Independent Stores

The November increase in sales of independent food retailers was approximately the same as that for chain stores, amounting to 10 per cent. Saskatchewan sales were up 15 per cent, although gains in Manitoba and Alberta were much smaller at 8 and 9 per cent respectively. Independent stores in Ontario enjoyed a greater margin of increase over November, 1944 than did chain stores. The 12 per cent increase recorded for that province was the second largest among the regional results. The Maritime Provinces continued to record smaller increases than those in other areas.

Comparison of Sales Reported for November, 1944 and 1945

	No. of Stores Reporting	No. Reporting An Increase	% Change In Sales November, 1945 November, 1944
CANADA	1,243	932	+10.2
Maritimes	174	106	+ 6.5
Quebec	291	227	+ 9.8
Ontario	400	313	+12.1
Manitoba	93	70	+ 7.8
Saskatchewan	60	50	+14.5
Alberta	108	76	+ 9.4
British Columbia ...	117	90	+10.5

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