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### CURRENT TRENDS IN FOOD DISTRIBUTION, APRIL, 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 vegetables 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

April wholesale sales of food products exceeded by a considerable margin the volume of grocery and fruit and vegetable sales made in April, 1944. Statements received from 74 of the larger wholesale grocery houses and 46 fruit and vegetable wholesalers revealed increases of 10 and 16 per cent for the respective trades.

The 10 per cent gain reported by grocery wholesalers indicated an active trading market in all regions of the country. Increases over April, 1944 on a regional basis are as follows: Prairie Provinces, 7 per cent; Ontario, 9 per cent; Quebec, 11 per cent; Maritime Provinces and British Columbia, 13 per cent. April sales were valued 5 per cent lower than the sales made by these firms in March, declines ranging from 3 per cent in Ontario to 6 per cent in British Columbia although partially offset by a 5 per cent increase in Quebec. Cumulative figures for the first four months of this year advanced 8 per cent over the sales transacted in the January-April period of last year.

Fruit and vegetable wholesalers reported gains of 14 per cent in British Columbia, 16 per cent in Ontario and 18 per cent in the Maritimes and Quebec which resulted for Canada in a 16 per cent increase in sales for April of this year over last. Dollar sales were 6 per cent above the March, 1945 level of trading while fruit and vegetable sales made during the January-April period of this year exceeded by 10 per cent the volume of business transacted during the same period of 1944.

Wholesale grocers valued their inventories on hand at the end of April 1 per cent higher than on the same date of last year, but stocks declined 2 per cent from the valuation placed on such holdings at the end of March, 1945. Stocks at the beginning of April are normally 35 per cent in excess of the volume of business transacted in that month as reflected in the average experience over the years 1935-1942. Inventories at the beginning of April this year were 27 per cent in excess of the volume of business transacted during the month, indicating that the inventory position at the beginning of April was slightly 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
		April, 1944	April, 1945	April, 1945 over April, 1944	March, 1945	Year-to- date, 1944
		\$	\$			
CANADA .....	74	17,734	19,434	+ 9.6	- 4.9	+ 8.2
Maritimes .....	15	2,296	2,598	+13.2	- 3.4	+ 8.7
Quebec .....	19	2,496	2,761	+10.6	+ 4.8	+ 4.5
Ontario .....	22	5,743	6,259	+ 9.0	- 2.7	+11.3
Prairies .....	12	4,761	5,073	+ 6.6	- 5.4	+ 6.7
British Columbia .....	6	2,438	2,743	+12.5	- 5.8	+11.4

Wholesale Fruit and Vegetable Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		Year-to- date, 1945
		April, 1944	April, 1945	April, 1945 over April, 1944	March, 1945	Year-to- date, 1944
		\$	\$			
CANADA .....	46	7,420	8,622	+16.2	+ 5.5	+10.2
Maritimes and Quebec .	15	1,593	1,887	+18.4	- 0.9	+11.1
Ontario .....	19	3,060	3,569	+16.6	+ 3.4	+10.9
Western Provinces ....	12	2,767	3,166	+14.4	+ 6.6	+ 9.5

Retail Sales

Chain Stores

Sales in April, 1945 of 935 chain store units operated by 26 chain companies in the food retailing field were on a par with the sales of 954 units operated by the same 26 firms in April a year ago. Average sales per store were \$15,965 in April, 1945, 2 per cent higher than the \$15,638 average for the same month of 1944.

The results for various sections of the country were quite uniform. Moderate increases occurred in Quebec, the Prairie Provinces and British Columbia, while Ontario and the Maritime Provinces recorded declines of 1 and 3 per cent respectively.

Comparison of Stores and Sales for April, 1944 and 1945

	April, 1944		April, 1945		Per cent change in sales
	No. Stores	Sales \$	No. Stores	Sales \$	
CANADA .....	954	14,918,615	935	14,926,915	+ 0.1
Maritimes .....	39	476,387	39	461,791	- 3.1
Quebec .....	174	3,065,094	168	3,099,864	+ 1.1
Ontario .....	502	8,058,703	493	7,991,502	- 0.8
Prairie Provinces ..	145	1,928,884	143	1,958,973	+ 1.6
British Columbia ...	94	1,389,547	92	1,414,785	+ 1.8

Independent Stores

Sales reported by 1,213 stores operating in the food retailing field were 1 per cent higher in April this year than last. The sample of stores comprising this survey included grocery stores, combination grocery and meat stores as well as meat markets.

Increases of 5 per cent in Saskatchewan and British Columbia were followed by gains of 3 per cent in Manitoba and 2 per cent in the Maritime Provinces. Ontario sales were unchanged from April a year ago, while declines in Quebec and Alberta amounted to 2 per cent in each case.

Comparison of Sales Reported for April, 1944 and 1945

	No. stores reporting	No. reporting increase	Per cent change in sales
CANADA .....	1,213	636	+ 0.5
Maritimes .....	174	100	+ 1.9
Quebec .....	279	128	- 1.5
Ontario .....	399	195	(a)
Manitoba .....	88	53	+ 2.6
Saskatchewan .....	55	37	+ 5.1
Alberta .....	105	46	- 2.1
British Columbia ...	113	77	+ 4.6

(a) Less than 0.1 per cent.



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