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CURRENT TRENDS IN FOOD DISTRIBUTION, MAY, 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

Wholesale food sales transacted in May of this year were 7 per cent greater than the volume of business done in May, 1944, according to statements received from 76 of the larger wholesale grocery houses and 47 wholesale fruit and vegetable establishments. The 7 per cent gain reflects an increase of 8 per cent in grocery sales while the fruit and vegetable trade recorded a gain of 4 per cent.

Each of the economic divisions reported a gain in wholesale grocery trading, but the increases varied greatly. Ontario sales advanced 14 per cent, the Maritime Provinces recorded a 9 per cent gain, increases of 6 per cent were reported by wholesalers in the Prairie Provinces and Quebec, and sales in British Columbia were 1 per cent higher in May of this year than last. May sales averaged 15 per cent higher than the volume of business transacted in April, 1945, and cumulative figures for the first five months of the current year are 8 per cent greater than for the same period of 1944.

Fruit and vegetable sales declined 3 per cent in the Maritime Provinces and Quebec, but increases of 7 and 4 per cent were recorded by Ontario and the Western Provinces respectively. May fruit and vegetable sales were 10 per cent greater than the April volume of business while aggregate sales for the January-May period of 1945 stand 9 per cent above the sales transacted in the same five months of last year.

Inventories in the hands of wholesale grocers at the end of May this year were valued 3 per cent lower than on the same date of last year and declined 7 per cent from the valuation placed on stock holdings at the end of April, 1945. Stocks at the beginning of May are normally 26 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 May this year were 8 per cent in excess of the volume of business transacted during the month, indicating that the inventory position at the beginning of May 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 Year-to-date, 1944
		May, 1944	May, 1945	May, 1945 over May, 1944	April, 1945	
		\$	\$			
CANADA	76	20,845	22,539	+ 8.1	+15.0	+ 8.2
Maritimes	16	2,835	3,076	+ 8.5	+12.5	+ 8.7
Quebec	20	3,176	3,366	+ 6.0	+10.7	+ 4.9
Ontario	22	6,309	7,189	+14.0	+15.5	+11.9
Prairies	12	5,530	5,885	+ 6.4	+17.3	+ 6.8
British Columbia ...	6	2,995	3,023	+ 0.9	+ 6.0	+ 9.0

Wholesale Fruit and Vegetable Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		Year-to-date, 1945 Year-to-date, 1944
		May, 1944	May, 1945	May, 1945 over May, 1944	April, 1945	
		\$	\$			
CANADA	47	9,248	9,584	+ 3.6	+ 9.5	+ 8.6
Maritimes and Quebec	14	2,104	2,051	- 2.5	+12.2	+ 6.8
Ontario	19	3,770	4,016	+ 6.5	+ 8.1	+ 9.8
Western Provinces ..	14	3,374	3,517	+ 4.2	+ 8.7	+ 9.0

Retail Sales

Chain Stores

Sales in May, 1945 of 890 chain store units operated by 25 chain companies in the food retailing field were 8 per cent higher than the sales of 911 units operated by the same 25 firms in May a year ago. Average sales per store were \$17,867 in May, 1945, 11 per cent higher than the \$16,122 average for the same month of 1944.

A 13 per cent increase in the Prairie Provinces featured the regional results. Sales of chain food stores located in Quebec Province were 10 per cent higher in May of this year compared with last, exceeding the gain recorded for the Dominion as a whole. Increases in other regions were slightly lower than the average increase for Canada.

Comparison of Stores and Sales for May, 1944 and 1945

	May, 1944		May, 1945		Per cent change in sales
	No. Stores	Sales	No. Stores	Sales	
		\$		\$	
CANADA	911	14,687,428	890	15,901,942	+ 8.3
Maritimes	39	476,130	38	506,619	+ 6.4
Quebec	172	3,028,262	165	3,329,026	+ 9.9
Ontario	516	8,126,793	506	8,708,932	+ 7.2
Prairie Provinces ..	99	1,717,859	97	1,934,832	+12.6
British Columbia ..	85	1,338,384	84	1,422,533	+ 6.3

Independent Stores

Sales reported by 1,230 stores operating in the food retailing field were 7 per cent higher in May this year than last. The sample of stores comprising this survey included grocery stores, combination grocery and meat stores as well as meat markets.

The increase of 13 per cent in Saskatchewan stood out among the results for various sections of the country. Increases in other provinces were within narrow limits of the average gain for Canada between May of the two years, with the exception of the Maritime Provinces where sales increased by only 3 per cent over May, 1944.

Comparison of Sales Reported for May, 1944 and 1945

	No. stores reporting	No. reporting increase	Per cent change in sales
CANADA	1,230	859	+ 7.3
Maritimes	176	117	+ 2.9
Quebec	279	182	+ 6.9
Ontario	406	289	+ 9.1
Manitoba	91	63	+ 7.2
Saskatchewan	58	47	+12.8
Alberta	108	76	+ 6.2
British Columbia ...	112	85	+ 8.1

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