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CURRENT TRENDS IN FOOD DISTRIBUTION, AUGUST, 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

Dollar sales realized by wholesale grocers in August were 4 per cent greater than the volume of business transacted in August, 1944, and 3 per cent greater than the July, 1945 level. These figures are based on returns from 72 of the larger wholesale grocery establishments operating in Canada. Substantial gains of 12 and 14 per cent in the Maritime Provinces and British Columbia respectively, were offset by a minor increase of 3 per cent in Quebec, a decline of 1 per cent in the Prairie Provinces, while Ontario reported dollar sales unchanged from August of last year. Aggregate sales for the year to date stand 8 per cent above the corresponding period of 1944.

Fruit and vegetable sales increased 16 per cent over August, 1944 but declined 3 per cent from the July volume of trading. Ontario came first in point of view of increased trading, recording a gain of 21 per cent. Sales transacted in the western provinces were up 13 per cent while the Maritime Provinces reported a minor gain of 2 per cent. Cumulative figures for the January-August period are 13 per cent higher than for the same eight months of 1944.

Inventories in the hands of wholesale grocers at the end of August were valued 9 per cent lower this year than last, and 2 per cent below the valuation placed on stocks at the end of July. Stocks on hand at the beginning of August are normally 11 per cent in excess of that month's requirements. Stocks on hand at the beginning of August this year were 13 per cent below the volume of August sales, indicating that the inventory position at the beginning of August 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
		August 1944	August 1945	August, 1945 over August, 1944 July, 1945		
		\$	\$			
CANADA	72	21,215	21,967	+ 3.5	+ 2.6	+ 7.5
Maritimes	16	2,796	3,143	+12.4	+ 3.0	+10.2
Quebec	18	2,886	2,980	+ 3.2	+ 3.4	+ 5.8
Ontario	21	6,921	6,919	-	+ 2.6	+ 8.6
Prairies	11	6,039	6,005	- 0.6	+ 1.2	+ 5.1
British Columbia ...	6	2,573	2,920	+13.5	+ 1.3	+11.4

Wholesale Fruit and Vegetable Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		Year-to-
		August	August	August, 1945 over		date, 1945
		1944	1945	August, 1944	July, 1945	Year-to- date, 1944
		\$	\$			
CANADA	46	9,556	11,043	+15.6	- 2.9	+13.2
Maritimes and Quebec	16	1,956	2,190	+ 2.0	-29.5	+13.0
Ontario	18	3,223	3,895	+20.9	- 5.5	+15.1
Western Provinces ..	12	4,377	4,958	+13.3	+16.2	+11.8

Retail Sales
Chain Stores

August, 1945 sales of 919 chain store units operated by 25 chain companies in the food retailing field were 11 per cent higher than sales of 948 stores operated by the same 25 firms in August a year ago. Average sales per store in August of this year were \$16,966, 14 per cent above the \$14,819 average for the same month of 1944.

Increases of 14 per cent occurred in Quebec, the Prairie Provinces and British Columbia. The increase of 11 per cent in the Maritime Provinces was on a par with the average gain for Canada while Ontario, with a gain of 9 per cent, was the only region showing an increase lower than that for Canada as a whole.

Comparison of Stores and Sales for August, 1944 and 1945

	August, 1944		August, 1945		Per cent change in sales
	No. Stores	Sales	No. Stores	Sales	
CANADA	948	14,048,716	919	15,592,201	+11.0
Maritimes	39	480,255	38	532,794	+10.9
Quebec	171	2,780,137	165	3,176,835	+14.3
Ontario	500	7,390,592	483	8,017,804	+ 8.5
Prairie Provinces ...	144	2,055,836	141	2,334,490	+13.6
British Columbia	94	1,341,896	92	1,530,278	+14.0

Independent Stores

Independent food stores, on the basis of reports received from 1,213 retail merchants, did 10 per cent more business in August this year compared with last. Grocery stores, combination grocery and meat stores and meat markets are represented in the sample of reporting companies.

An outstanding gain of 18 per cent took place in Saskatchewan, while the average increase for Canada was slightly exceeded in Ontario and British Columbia. Increases in other sections of the country were within the range of 7 to 10 per cent.

Comparison of Sales Reported for August, 1944 and 1945

	No. stores reporting	No. reporting increase	Per cent change in sales
CANADA	1,213	903	+10.4
Maritimes	175	120	+ 7.9
Quebec	282	219	+ 9.9
Ontario	387	288	+11.6
Manitoba	89	70	+ 8.3
Saskatchewan	57	49	+18.1
Alberta	105	68	+ 6.8
British Columbia	118	89	+11.9



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