

*M. Mackinnon*

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Published by Authority of the HON. JAMES A. MACKINNON, M.P.,  
Minister of Trade and Commerce

DEPARTMENT OF TRADE AND COMMERCE  
DOMINION BUREAU OF STATISTICS  
MERCHANDISING AND SERVICES BRANCH  
OTTAWA, CANADA

Acting Dominion Statistician;

Herbert Marshall, B. A., F. S. S.

Chief, Merchandising and Services Branch;

A. C. Steedman, B. A.

Vol. 7 - No. 9

Year's Subscription, \$1.00

Single Copies, .10

### CURRENT TRENDS IN FOOD DISTRIBUTION, SEPTEMBER, 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

September wholesale grocery sales were 2 per cent lower than the volume of business realized in September, 1944 and 4 per cent below August, 1945 sales. These results are based on data received from 77 of the larger wholesale grocery establishments operating in Canada. Declines of 9 per cent in the Maritime Provinces and 5 per cent in both Quebec and the Prairie Provinces were partially offset by gains of 3 per cent in Ontario and 4 per cent in British Columbia. Total sales transacted in the January-September period of this year are 6 per cent greater than the business realized in the same period of 1944.

Fruit and vegetable sales increased 20 per cent in September this year over last, and 7 per cent over August transactions. The 20 per cent gain reflects an active trading market in all regions of the country, sales increasing 19 per cent in the Maritime Provinces and Quebec, 26 per cent in Ontario and 16 per cent in the Western Provinces. Aggregate sales for the year to date stand 14 per cent higher than sales transacted in the same 9 months of 1944.

Wholesale grocery stocks at the end of September were valued 6 per cent lower this year than last, but increased 9 per cent over the inventories held at the end of August. Stocks on hand at the beginning of September are normally 10 per cent in excess of the business transacted in that month. Stocks on hand at the beginning of September this year were 13 per cent below the volume of September sales, indicating that the inventory position at the beginning of September 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
		September 1944	September 1945	September, 1945 over September, August, 1944	1945	Year-to-date, 1944
		\$	\$			
CANADA .....	77	21,629	21,213	- 1.9	- 3.7	+ 6.4
Maritimes .....	17	3,140	2,869	- 8.6	-11.7	+ 7.9
Quebec .....	20	3,100	2,934	- 5.4	- 2.1	+ 4.3
Ontario .....	22	6,291	6,503	+ 3.4	- 2.1	+ 7.9
Prairies .....	12	6,329	6,017	- 4.9	- 3.8	+ 3.8
British Columbia ...	6	2,769	2,890	+ 4.4	+ 4.7	+10.5

# Wholesale Fruit and Vegetable Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		Year-to-date, 1945
		September 1944	September 1945	September, 1945 over September, August, 1944	1945	Year-to-date, 1944
		\$	\$			
CANADA .....	49	9,114	10,892	+19.5	+ 7.0	+14.0
Maritimes and Quebec	18	1,960	2,336	+19.2	+56.5	+13.8
Ontario .....	18	2,777	3,496	+25.9	- 3.2	+16.2
Western Provinces ..	13	4,377	5,060	+15.6	- 3.0	+12.3



Retail Sales  
Chain Stores

September, 1945 sales of 953 chain store units operated by 26 chain companies in the food retailing field were 4 per cent lower than sales of 925 stores operated by the same 26 firms in September a year ago. Average sales per store in September of this year were \$16,593, practically unchanged from the \$16,696 average for the same month of 1944.

Western provinces recorded gains of 6 per cent in British Columbia and 2 per cent in the Prairie Provinces. Declines in eastern sections of the country were fairly uniform at 5 or 6 per cent.

Comparison of Stores and Sales for September, 1944 and 1945

	September, 1944		September, 1945		Per cent change in sales
	No. Stores	Sales \$	No. Stores	Sales \$	
CANADA .....	953	15,911,520	925	15,348,911	- 3.5
Maritimes .....	39	517,396	38	492,740	- 4.8
Quebec .....	171	3,378,955	165	3,167,493	- 6.3
Ontario .....	516	8,404,351	497	7,958,619	- 5.3
Prairie Provinces ..	134	2,190,238	133	2,226,244	+ 1.6
British Columbia ...	93	1,420,580	92	1,503,815	+ 5.9

Independent Stores

In contrast to the substantial increases which characterized corresponding month comparisons between this year and last for earlier months, sales of independent food outlets were unchanged in September, 1945 compared with the corresponding month a year ago. Reason for this was twofold. In the first instance there was one more business day in September of last year than this. Secondly the introduction of meat rationing on September 3rd tended to reduce the volume of business transacted by meat markets and combination stores.

Comparison of Sales Reported for September, 1944 and 1945

	No. stores reporting	No. reporting increase	Per cent change in sales
CANADA .....	1,231	610	- 0.1
Maritimes .....	181	84	- 3.4
Quebec .....	289	138	- 0.6
Ontario .....	403	198	+ 0.7
Manitoba .....	84	41	- 1.1
Saskatchewan .....	60	26	+ 1.1
Alberta .....	105	62	+ 2.8
British Columbia ...	109	61	+ 2.0

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