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CURRENT TRENDS IN FOOD DISTRIBUTION, OCTOBER, 1946

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 Statistics 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

The dollar volume of sales of wholesale grocers during October, 1946 was 22 per cent higher than in the same month last year and 11 per cent above that for the month of September, 1946, according to statements received from 74 of the larger wholesale grocers throughout Canada. Gains were recorded in all sections of the country. Sales in the Maritime Provinces were up 11 per cent over 1945, while the other regions reported more substantial increases ranging between 22 and 26 per cent. Aggregate sales for the first ten months of 1946 were 16 per cent greater than in the corresponding period last year.

Sales of fruits and vegetables showed a more varied experience according to reports from 49 of the larger wholesalers in this trade. Decreases of 9 per cent reported for the Maritime Provinces and Quebec and of 7 per cent for Ontario were offset by a gain of 12 per cent in dollar volume of sales in the Western Provinces, with the result that sales for Canada as a whole showed practically no change from last year. October sales of fruits and vegetables dropped 4 per cent from the September level, while sales for the year to date stood 16 per cent above those for the corresponding period in 1945.

Stocks held by wholesale grocers at the end of October, 1946 were valued 32 per cent higher than at the same date last year and 13 per cent above those on hand at the end of September, 1946. Inventories at the beginning of October are normally 17 per cent in excess of sales for that month. This year, stocks on hand at the beginning of October were valued 17 per cent below the sales volume for that month, indicating that the inventory position was still considerably below the normal situation.

Wholesale Grocery Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		
		October 1945	October 1946	Oct., 1946 over Oct. 1945		Year-to-date, 1946
		\$	\$	Oct. 1945	Sept. 1946	Year-to-date, 1945
CANADA	74	23,388	28,501	+21.9	+11.0	+15.5
Maritimes	17	3,326	3,706	+11.4	+14.8	+ 9.3
Quebec	19	3,394	4,271	+25.8	+20.5	+15.7
Ontario	20	7,282	8,891	+22.1	+10.5	+16.3
Prairies	12	6,322	7,840	+24.0	+10.1	+16.7
British Columbia	6	3,064	3,793	+23.8	+ 3.3	+17.9

Wholesale Fruit and Vegetable Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		
		October 1945	October 1946	Oct., 1946 over Oct. 1945		Year-to-date, 1946
		\$	\$	Oct. 1945	Sept. 1946	Year-to-date, 1945
CANADA	49	11,156	11,159	(a)	- 4.4	+16.0
Maritimes and Quebec .	17	2,619	2,373	- 9.4	-21.0	+ 5.5
Ontario	18	4,157	3,888	- 6.5	+ 7.1	+16.0
Western Provinces	14	4,380	4,898	+11.8	- 4.3	+22.5

(a) Unchanged.

Retail Sales
Chain Stores

October, 1946 sales of 874 chain store units operated by 25 chain companies in the food retailing field were 12 per cent higher than sales of 880 stores operated by the same 25 firms in October, 1945. Average sales per store in October, 1946 were \$20,052, 13 per cent above the \$17,812 average for the same month of the previous year.

Increases in chain food stores were very uniform throughout all regions. British Columbia alone surpassed the average for the country as a whole by one per cent, while all other regions showed increases of 12 per cent over last year, except the Maritime Provinces where the gain was 11 per cent.

Comparison of Stores and Sales for October, 1945 and 1946

	October, 1945		October, 1946		% Change In Sales Oct., 1946 Oct., 1945
	No. of Stores	Sales \$	No. of Stores	Sales \$	
CANADA	880	15,674,357	874	17,525,801	+11.8
Maritimes	32	454,124	32	503,445	+10.9
Quebec	165	3,477,282	165	3,883,325	+11.7
Ontario	497	8,388,108	493	9,355,462	+11.5
Prairie Provinces ..	94	1,892,398	93	2,125,484	+12.3
British Columbia ...	92	1,462,445	91	1,658,085	+13.4

Independent Stores

Independent food stores did 10 per cent more business in October this year than last. The largest increase was one of 14 per cent in Manitoba. This was closely followed by Ontario, Alberta, Saskatchewan, British Columbia and Quebec where increases ranged from 13 down to 9 per cent. The Maritime Provinces showed the smallest gain, sales being up only 6 per cent over October a year ago.

Comparison of Sales Reported for October, 1945 and 1946

	No. of Stores Reporting	No. Reporting An Increase	% Change in Sales October, 1946 October, 1945
CANADA	1,237	888	+10.3
Maritimes	184	108	+ 5.9
Quebec	289	202	+ 8.8
Ontario	388	296	+12.8
Manitoba	86	73	+13.9
Saskatchewan	71	54	+10.7
Alberta	112	86	+11.9
British Columbia ..	107	69	+ 9.9

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