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CURRENT TRENDS IN FOOD DISTRIBUTION, NOVEMBER, 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

Dollar sales of wholesale grocers in November, 1946 were 18 per cent greater than in November, 1945, but dropped 7 per cent below the volume transacted in October, 1946. These figures are based on statements received from 76 of the larger wholesale grocers in Canada. All regions of the country had a share in the general increase over last year. Sales in the Maritime Provinces were up 14 per cent, in Ontario, 15 per cent, and in Quebec, 19 per cent. Slightly greater increases of 22 per cent and 23 per cent were recorded for the Prairies and British Columbia respectively. Cumulative sales transacted in the January-November period of 1946 were 16 per cent above those for the corresponding period of 1945.

November wholesale sales of fruits and vegetables reported by 48 of the larger wholesalers in this trade showed an overall decrease for Canada of 3 per cent from November a year ago. The October-November comparison revealed a drop of 9 per cent in dollar volume of sales between the two months. The trend between November, 1945 and November, 1946 varied in the different regions of the country. Wholesalers of fruits and vegetables in the Maritime Provinces registered a drop of 5 per cent in sales, those in Ontario, a decrease of 13 per cent while dealers in the Western provinces reported an increase of 11 per cent. Sales for the year to date were 14 per cent in advance of those for the corresponding period of 1945.

Wholesale grocers' stocks at the end of November, 1946 were valued 37 per cent higher than those held at the same date last year and 9 per cent above the value of stocks on hand at the end of October. Inventories at the beginning of November are normally 43 per cent in excess of sales for that month. Stocks on hand at the beginning of November this year were 1 per cent below the volume of November sales.

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Wholesale Grocery Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		
		November 1945	November 1946	Nov., 1946 over Nov., Oct., 1945 1946		Year-to- date, 1946
		\$	\$			Year-to- date, 1945
CANADA .....	76	23,955	28,345	+18.3	- 6.6	+15.8
Maritimes .....	15	2,945	3,356	+14.0	- 2.4	+ 9.7
Quebec .....	21	3,974	4,725	+18.9	-10.1	+16.0
Ontario .....	21	7,616	8,722	+14.5	- 6.9	+16.1
Prairies .....	13	6,259	7,550	+22.2	- 7.3	+17.2
British Columbia ....	6	3,161	3,892	+23.1	- 3.7	+18.4

Wholesale Fruit and Vegetable Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		
		November 1945	November 1946	Nov., 1946 over Nov., Oct., 1945 1946		Year-to- date, 1946
		\$	\$			Year-to- date, 1945
CANADA .....	48	9,752	9,488	- 2.7	- 9.0	+14.2
Maritimes and Quebec .	17	2,303	2,184	- 5.1	+ 0.9	+ 4.5
Ontario .....	18	4,043	3,532	-12.6	- 1.7	+13.1
Western Provinces ....	13	3,406	3,772	+10.7	-15.4	+21.4



Retail Sales  
Chain Stores

November, 1946 sales of 861 chain store units operated by 23 chain companies in the food retailing field were 17 per cent higher than sales of 868 stores operated by the same 23 firms in November, 1945. Average sales per store in November, 1946 were \$21,887, 18 per cent above the \$18,552 average for the same month of the previous year.

Sales of chain food stores showed the largest increase in Quebec and a gain of 21 per cent in that province was the only one among those for the various regions to surpass the average increase for Canada. Gains in other regions ranged from 17 per cent in British Columbia to 14 per cent in the Maritime Provinces.

Comparison of Stores and Sales for November, 1945 and 1946

	November, 1945		November, 1946		% Change In Sales Nov., 1946 Nov., 1945
	No. of Stores	Sales	No. of Stores	Sales	
CANADA .....	868	16,103,123	861	18,844,826	+17.0
Maritimes .....	32	463,706	32	526,494	+13.5
Quebec .....	165	3,457,640	165	4,171,095	+20.6
Ontario .....	486	8,791,691	480	10,209,545	+16.1
Prairie Provinces ..	93	1,890,890	93	2,180,517	+15.3
British Columbia ...	92	1,499,196	91	1,757,175	+17.2

Independent Stores

Independent stores did 12 per cent more business in November this year than last. Manitoba showed the largest gains, as it had done in October also. Sales were 17 per cent higher there than in November, 1945. This gain was closely followed by Saskatchewan where an increase of 16 per cent occurred. Alberta and British Columbia had 14 per cent increases while Ontario stores experienced a 13 per cent gain. Quebec and the Maritime Provinces recorded the smallest gains of 9 and 8 per cent respectively.

Comparison of Sales Reported for November, 1945 and 1946

	No. of Stores Reporting	No. Reporting An Increase	% Change In Sales November, 1946 November, 1945
CANADA .....	1,202	926	+11.8
Maritimes .....	176	111	+ 8.2
Quebec .....	280	201	+ 9.2
Ontario .....	381	308	+13.1
Manitoba .....	84	75	+16.5
Saskatchewan .....	69	60	+15.9
Alberta .....	105	82	+13.9
British Columbia ..	107	89	+13.7

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