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CURRENT TRENDS IN FOOD DISTRIBUTION, DECEMBER, 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

Wholesale grocers' sales in December, 1946 were 17 per cent greater in dollar volume than in the same month last year according to statements received from 73 of the larger firms across Canada. There was a seasonal drop from November of 13 per cent. The increase was general throughout the different regions of Canada, the greatest gain, 27 per cent, being recorded for British Columbia. Sales of wholesale grocers in Quebec were 21 per cent above those for December, 1945 and in the Prairies, 18 per cent. Lesser, but still substantial, increases were reported in Ontario and the Maritime Provinces where wholesalers' sales were 13 and 11 per cent higher respectively than in December last year. Preliminary figures for the twelve months of 1946 indicate that wholesale grocers' sales during that year were 16 per cent above the 1945 volume.

December sales of fruit and vegetable wholesalers were 7 per cent below the volume in December, 1945, continuing the trend that has been in evidence during the immediately preceding months, but were 5 per cent above those for November, 1946. These figures are based on statements from 46 of the larger wholesalers in this trade. Sales in the Western Provinces, which had been showing increases over 1945 in the past months despite decreased sales in the East, dropped in December to practically the same level as in December, 1945. A decrease of 12 per cent was recorded in the Maritimes and Quebec combined, while sales of wholesalers of fruits and vegetables in Ontario dropped 11 per cent below December a year ago. Sales for the twelve months of 1946 were 12 per cent higher than those in the year 1945.

The value of stocks in the hands of wholesale grocers at the end of December, 1946 was 44 per cent higher than at the same date last year and 13 per cent above the value of inventory at the end of November, 1946. Inventories at the beginning of December are normally 64 per cent in excess of sales in that month. Stocks at the beginning of December this year were valued 15 per cent higher than the sales during that month, indicating that the inventory position of wholesale grocers is still below normal.

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Wholesale Grocery Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales		Per cent change		
		December	December	Dec., 1946 over		12 months
		1945	1946	Dec., 1945	Nov., 1946	1946 12 months 1945
		\$000	\$000			
CANADA .....	73	20,824	24,358	+17.0	-13.1	+15.9
Maritimes .....	17	2,986	3,308	+10.8	-12.6	+ 9.7
Quebec .....	18	2,547	3,075	+20.7	-15.2	+16.4
Ontario .....	21	6,808	7,706	+13.2	- 8.9	+15.9
Prairies .....	11	5,487	6,477	+18.0	-23.4	+17.3
British Columbia ....	6	2,996	3,792	+26.6	- 3.2	+19.1

Wholesale Fruit and Vegetable Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales		Per cent change		
		December	December	Dec., 1946 over		12 months
		1945	1946	Dec., 1945	Nov., 1946	1946 12 months 1945
		\$000	\$000			
CANADA .....	46	10,488	9,743	- 7.1	+ 5.4	+12.2
Maritimes and Quebec .	15	2,347	2,072	-11.7	+ 3.3	+ 3.1
Ontario .....	18	4,174	3,702	-11.3	+ 7.7	+10.6
Western Provinces ....	13	3,967	3,969	+ 0.1	- 2.5	+19.4



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Retail Sales  
Chain Stores

December, 1946 sales of 866 chain store units operated by 24 chain companies in the food retailing field were 5 per cent higher than sales of 873 stores operated by the same 24 firms in December, 1945. Average sales per store in December, 1946 were \$21,873, 6 per cent above the \$20,691 average for the same month of the previous year.

British Columbia reported the largest increase in chain food store sales in December of this year compared with last. A gain of 10 per cent in that province and one of 7 per cent in Quebec were the only two which exceeded the increase of 5 per cent for the Dominion. Gains of 4 per cent and 2 per cent occurred in Ontario and the Prairie Provinces respectively, while the Maritime Provinces showed a fractional decrease below December, 1945.

Comparison of Stores and Sales for December, 1945 and 1946

	December, 1945		December, 1946		% Change In Sales Dec., 1946 Dec., 1945
	No. of Stores	Sales \$	No. of Stores	Sales \$	
CANADA .....	873	18,063,533	866	18,941,964	+ 4.9
Maritimes .....	32	534,465	32	532,712	- 0.3
Quebec .....	165	3,916,311	164	4,177,045	+ 6.7
Ontario .....	491	9,892,958	486	10,302,350	+ 4.1
Prairie Provinces ..	93	2,042,837	93	2,079,170	+ 1.8
British Columbia ...	92	1,676,962	91	1,850,687	+10.4

Independent Stores

Independent stores did 4 per cent more business in December this year than in 1945. The western provinces reported the larger increases. British Columbia and Alberta experienced 9 per cent gains, which were closely followed by a 7 per cent advance in Manitoba. Saskatchewan, Ontario and Quebec each recorded 4 per cent gains, while sales in the Maritime Provinces were practically unchanged from December of last year.

Comparison of Sales Reported for December, 1945 and 1946

	No. of Stores Reporting	No. Reporting An Increase	% Change In Sales December, 1946 December, 1945
CANADA .....	1,215	700	+ 4.4
Maritimes .....	188	86	+ 0.1
Quebec .....	286	169	+ 3.8
Ontario .....	372	197	+ 4.1
Manitoba .....	89	59	+ 6.5
Saskatchewan .....	67	38	+ 4.2
Alberta .....	103	78	+ 9.1
British Columbia .	110	73	+ 9.0



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