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

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CURRENT TRENDS IN FOOD DISTRIBUTION, MARCH, 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 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 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

March wholesale grocery sales were 10 per cent greater than the dollar volume of grocery sales transacted in March, 1945 and were valued 8 per cent higher than sales realized in February, 1946. These results are based on data received from 75 of the larger wholesale grocery establishments operating in Canada. All regions of the country shared in the 10 per cent gain, sales increasing 6 per cent in the Maritime Provinces; 13 per cent in Québec; 9 per cent in Ontario; 12 per cent in the Prairie Provinces; 9 per cent in British Columbia. Total sales for the first quarter of this year advanced 11 per cent over the corresponding period of 1945.

The fruit and vegetable trade reported 26 per cent more sales transacted in March, 1946 than 1945, and a gain of 23 per cent over February sales. Statements received from 46 of the larger wholesale fruit and vegetable houses revealed the foregoing data. The 26 per cent increase reflects substantial gains in Ontario and the western provinces which were partially offset by a smaller gain in the Maritime Provinces and Quebec. Sales advanced 33 per cent in Ontario, 29 per cent in the western provinces, and 10 per cent in the Maritime Provinces and Quebec. Cumulative fruit and vegetable sales for the first three months of this year stand 25 per cent above the January-March period of 1945.

March month-end wholesale grocery stocks declined 1 per cent from the inventories on hand at the end of March, 1945 but were valued 5 per cent higher than stocks held at the close of February. Inventories at the beginning of March are normally 49 per cent in excess of the volume of business transacted during that month. Stocks on hand at the beginning of March, 1946, were 2 per cent below the volume of March sales, indicating that the inventory position at the beginning of March was decidedly below the normal situation for that period of the year.

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Wholesale Grocery Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		Year-to- date, 1946 Year-to- date, 1945
		March, 1945	March, 1946	March, 1946 over March, 1945	February 1946	
		\$	\$			
CANADA	75	20,706	22,728	+ 9.8	+ 8.2	+11.1
Maritimes	17	2,959	3,124	+ 5.6	+17.4	+ 7.5
Quebec	19	2,803	3,171	+13.2	+11.0	+11.5
Ontario	21	6,584	7,152	+ 8.6	+ 8.7	+10.0
Prairies	12	5,406	6,068	+12.2	+ 7.0	+13.0
British Columbia .	6	2,954	3,213	+ 8.8	+ 3.1	+13.0

Wholesale Fruit and Vegetable Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		Year-to- date, 1946 Year-to- date, 1945
		March, 1945	March, 1946	March, 1946 over March, 1945	February, 1946	
		\$	\$			
CANADA	46	8,270	10,414	+25.9	+22.7	+25.1
Maritimes and Quebec	15	1,916	2,100	+ 9.6	+12.2	+ 9.7
Ontario	17	3,304	4,380	+32.5	+31.7	+31.7
Western Provinces ...	14	3,050	3,934	+29.0	+18.1	+27.3

Retail Sales
Chain Stores

March, 1946 sales of 888 chain store units operated by 26 chain companies in the food retailing field were 9 per cent higher than sales of 908 stores operated by the same 26 firms in March, 1945. Average sales per store in March, 1946 were \$20,713, 11 per cent above the \$18,653 average for the same month of the previous year.

Increases in dollar sales were highest in western Canada, amounting to 13 per cent in the Prairie Provinces and 10 per cent in British Columbia. In eastern sections of the country gains tapered down to 9 per cent in Ontario, 7 per cent in Quebec and 2 per cent in the Maritime Provinces.

Comparison of Stores and Sales for March, 1945 and 1946

	March, 1945		March, 1946		% Change In Sales Mar., 1946 Mar., 1945
	No. of Stores	Sales \$	No. of Stores	Sales \$	
CANADA	908	16,937,235	888	18,393,311	+ 8.6
Maritimes	41	552,709	40	562,096	+ 1.7
Quebec	167	3,610,885	162	3,848,009	+ 6.6
Ontario	515	9,291,274	500	10,099,706	+ 8.7
Prairie Provinces ...	93	1,899,895	94	2,142,545	+12.8
British Columbia	92	1,582,472	92	1,740,955	+10.0

Independent Stores

Independent food merchants reported sales which averaged 5 per cent higher in March this year than last, the gain being somewhat smaller than that for chain firms in the same month. Stores operating in the Prairie Provinces experienced highest gains, but there was wide divergence in the extent of sales increases even within that area. Saskatchewan stores had an increase of 17 per cent followed by gains of 13 per cent in Alberta and 8 per cent in Manitoba. The increase in British Columbia was 4 per cent, a much smaller gain than was reported by chain companies in that province. In eastern areas, increases were as follows; 6 per cent in Ontario; 3 per cent in Quebec and 1 per cent in the Maritime Provinces.

Comparison of Sales Reported For March, 1945 and 1946

	No. of Stores Reporting	No. Reporting An Increase	% Change In Sales March, 1946 March, 1945
CANADA	1,196	733	+ 5.4
Maritimes	180	90	+ 0.9
Quebec	271	142	+ 3.4
Ontario	373	222	+ 6.4
Manitoba	89	63	+ 8.4
Saskatchewan	60	49	+16.5
Alberta	108	85	+12.8
British Columbia .	115	82	+ 4.0

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