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CURRENT TRENDS IN FOOD DISTRIBUTION, APRIL, 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

The dollar volume of sales transacted by wholesale grocers in April, 1946 advanced 14 per cent over April, 1945 and one per cent over March, 1946 sales, according to statements received from 73 of the larger wholesale grocery establishments operating in Canada. While each region of the country reported increased trading activities, gains were smaller in the eastern areas of the country than in Ontario and the western provinces. Sales increased 5 per cent in the Maritime Provinces, 12 per cent in Quebec, 14 per cent in Ontario, 18 per cent in the Prairie Provinces, and 17 per cent in British Columbia.

April wholesale fruit and vegetable sales gained 26 per cent this year over last and were 8 per cent higher than the March, 1946 volume of trading. These results are based on reports received from 49 of the larger wholesale fruit and vegetable houses in Canada. Substantial gains were recorded by each region, sales increasing 17 per cent in the Maritime Provinces and Quebec, 29 per cent in Ontario, and 30 per cent in the western provinces.

Wholesale grocery stocks at the end of April fell 3 per cent below the inventories held on the same date of 1945, and 5 per cent below the March month-end stock holdings. Inventories at the beginning of April are normally 35 per cent in excess of the volume of business transacted during that month. Stocks on hand at the beginning of April, 1946, were 6 per cent below the volume of April sales, indicating that the inventory position at the beginning of April was 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
		April, 1945	April, 1946	April, 1946 over April, 1945	March, 1946	
		\$	\$			
CANADA	73	19,293	21,969	+13.9	+ 1.1	+11.8
Maritimes	17	2,702	2,840	+ 5.1	- 3.6	+ 6.9
Quebec	19	2,997	3,341	+11.5	+ 3.8	+11.4
Ontario	20	5,927	6,759	+14.0	+ 2.1	+11.0
Prairies	11	4,924	5,809	+18.0	- 0.2	+14.3
British Columbia	6	2,743	3,220	+17.4	+ 1.6	+14.1

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
		April, 1945	April, 1946	April, 1946 over April, 1945	March, 1946	
CANADA	49	8,963	11,322	+26.3	+ 8.3	+26.0
Maritimes and Quebec .	16	2,135	2,494	+16.9	+17.8	+15.5
Ontario	19	3,569	4,597	+28.8	+ 1.1	+30.5
Western Provinces	14	3,259	4,231	+29.8	+ 6.8	+27.9

Retail Sales
Chain Stores

April, 1946 sales of 874 chain store units operated by 24 chain companies in the food retailing field were 13 per cent higher than sales of 893 stores operated by the same 24 firms in April, 1945. Average sales per store in April, 1946 were \$19,111, 16 per cent above the \$16,496 average for the same month of the previous year.

Chain food stores in British Columbia had larger increases than had those located elsewhere, as sales volume moved 18 per cent ahead of that for April of last year. The Prairie Provinces followed with an increase of 15 per cent. Slightly lower increases of 13 per cent occurred in Ontario and Quebec, while a comparatively moderate advance of 8 per cent was reported for the Maritime Provinces. The results for Ontario and Quebec would conform more closely with those for the western provinces if average sales per store were used as the basis of measurement. There was a slight reduction in the number of Quebec and Ontario chain stores in operation in 1946 compared with last year.

Comparison of Stores and Sales for April, 1945 and 1946

	April, 1945		April, 1946		% Change In Sales Apr., 1946 Apr., 1945
	No. of Stores	Sales	No. of Stores	Sales	
CANADA	893	14,730,490	874	16,703,296	+13.4
Maritimes	33	425,329	32	458,739	+ 7.9
Quebec	166	3,049,861	162	3,452,138	+13.2
Ontario	508	8,103,800	494	9,120,476	+12.6
Prairie Provinces ..	94	1,736,562	94	2,001,087	+15.2
British Columbia ...	92	1,414,938	92	1,670,856	+18.1

Independent Stores

Retail sales by independent food stores averaged 12 per cent higher for the country as a whole in April this year compared with last. Saskatchewan continued somewhat ahead of other provinces in the rate of increase, with sales 20 per cent higher in April of this year than last. Other sizable increases were those of 17 per cent for Alberta and 15 per cent for both Manitoba and Ontario. British Columbia independent stores had a somewhat smaller increase in business than did chain stores in that province, sales being up 11 per cent over April, 1945. Smallest increases were those for Quebec and the Maritime Provinces which amounted to 9 and 7 per cent respectively.

Comparison of Sales Reported for April, 1945 and 1946

	No. of Stores Reporting	No. Reporting An Increase	% Change In Sales April, 1946 April, 1945
CANADA	1,207	891	+11.9
Maritimes	181	111	+ 7.0
Quebec	285	201	+ 9.0
Ontario	389	287	+14.7
Manitoba	85	69	+14.6
Saskatchewan	56	49	+20.3
Alberta	103	92	+16.5
British Columbia ...	108	82	+10.8

