

Published by Authority of the HON. JAMES A. MacKINNON, M.P.,
Minister of Trade and Commerce

DEPARTMENT OF TRADE AND COMMERCE
DOMINION BUREAU OF STATISTICS
MERCHANDISING AND SERVICES BRANCH
OTTAWA, CANADA

Dominion Statistician;
Chief, Merchandising and Services Branch;
Vol. 8 - No. 5

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16-4050

CURRENT TRENDS IN FOOD DISTRIBUTION, MAY, 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

May wholesale food sales showed marked expansions over May, 1945, the wholesale grocery trade advancing 16 per cent and the fruit and vegetable trade 25 per cent. These data are based on statements received from 79 of the larger wholesale grocery establishments and 46 wholesale fruit and vegetable merchants. These increases fall in line with the general pattern of wholesale trading witnessed in May, the composite unadjusted index of May, 1946, sales rising to a level considerably higher than that recorded for any month in recent years.

The wholesale grocery trade had an active market in all regions of the country, although the sales expansion was smaller in the Maritime Provinces than elsewhere. Wholesale grocery sales increased 6 per cent in the Maritime Provinces, 17 per cent in Quebec, 16 per cent in Ontario, 17 per cent in the Prairie Provinces, and 23 per cent in British Columbia in May of this year over last. May wholesale grocery sales advanced 15 per cent over the April, 1946, volume of trading.

Wholesale fruit and vegetable sales maintained a high level of trading in all regions of the country in May, 1946 over 1945, sales advancing 11 per cent in the Maritime Provinces and Quebec, 26 per cent in Ontario, and 32 per cent in British Columbia. Sales for the month were valued 5 per cent higher than the dollar value of trading transacted in April, 1946.

The inventory position at the end of May increased 4 per cent over May, 1945, but declined 1 per cent from the stocks held at the end of April, 1946. Inventories at the end of May are normally 26 per cent in excess of the volume of business transacted during that month. Stocks on hand at the beginning of May, 1946, were 17 per cent below the volume of May sales, indicating that the inventory position at the beginning of May was decidedly below the normal situation for that period of the year.

Year's Subscription, \$1.00
Single Copies, .10

Wholesale Grocery Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		
		May, 1945	May, 1946	May, 1946 over May, April, 1945 1946		Year-to- date, 1946
		\$	\$			Year-to- date, 1945
CANADA	79	22,580	26,254	+16.3	+14.9	+12.7
Maritimes	11	2,997	3,180	+ 6.1	+13.9	+ 6.7
Quebec	21	3,441	4,030	+17.1	+16.8	+13.0
Ontario	21	6,981	8,086	+15.8	+18.3	+11.9
Prairies	14	6,151	7,247	+17.8	+16.7	+15.1
British Columbia	6	3,010	3,711	+23.3	+11.3	+16.0

Wholesale Fruit and Vegetable Trade By Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		
		May, 1945	May, 1946	May, 1946 over May, April, 1945 1946		Year-to- date, 1946
		\$	\$			Year-to- date, 1945
CANADA	46	9,403	11,738	+24.8	+ 4.6	+25.7
Maritimes and Quebec ..	15	1,998	2,216	+10.9	- 2.1	+14.6
Ontario	19	4,015	5,046	+25.7	+ 5.6	+29.3
Western Provinces	12	3,390	4,476	+32.0	+10.8	+28.9

Retail Sales
Chain Stores

May, 1946 sales of 877 chain store units operated by 25 chain companies in the food retailing field were 9 per cent higher than sales of 891 stores operated by the same 25 firms in May, 1945. Average sales per store in May, 1946 were \$19,920, 11 per cent above the \$17,934 average for the same month of the previous year.

A 20 per cent increase in chain food store sales for British Columbia was outstanding. Increases elsewhere amounted to 14 per cent in the Prairie Provinces, 11 per cent in Quebec, 6 per cent in Ontario and 4 per cent in the Maritime Provinces.

Comparison of Stores and Sales for May, 1945 and 1946

	May, 1945		May, 1946		% Change In Sales May, 1946 May, 1945
	No. of Stores	Sales \$	No. of Stores	Sales \$	
CANADA	891	15,978,862	877	17,469,829	+ 9.3
Maritimes	32	463,866	32	481,700	+ 3.8
Quebec	165	3,329,026	164	3,684,194	+10.7
Ontario	508	8,756,732	495	9,304,684	+ 6.3
Prairie Provinces ..	94	1,927,944	94	2,197,594	+14.0
British Columbia ...	92	1,501,294	92	1,801,657	+20.0

Independent Stores

Retail sales by independent food stores averaged 11 per cent higher for the country as a whole in May this year compared with last. The large increases which have characterized results for Saskatchewan in recent months continued in May when sales in that province were 22 per cent above May, 1945 volume. Other provinces recording increases above the average result were Alberta, 14 per cent, and Ontario, 13 per cent. Increases in other areas ranged downwards to a low of 7 per cent in British Columbia.

Comparison of Sales Reported for May, 1945 and 1946

	No. of Stores Reporting	No. Reporting An Increase	% Change In Sales May, 1946 May, 1945
CANADA	1,202	871	+11.2
Maritimes	175	111	+ 8.9
Quebec	277	198	+ 8.7
Ontario	390	277	+13.3
Manitoba	86	67	+11.4
Saskatchewan	63	55	+21.6
Alberta	101	86	+14.6
British Columbia ...	110	77	+ 7.3



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