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CURRENT TRENDS IN FOOD DISTRIBUTION, JUNE, 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

Wholesale food sales were valued considerably higher in June of this year than last, the grocery trade increasing by 7 per cent and the fruit and vegetable trade by 18 per cent. The foregoing results are based on statements received from 70 of the larger grocery establishments and 47 fruit and vegetable merchants operating in Canada.

The 7 per cent increase over June, 1945 reported by the wholesale grocery trade results from substantially above average increases in the Prairie Provinces and British Columbia partially offset by declines in the Maritime Provinces and Quebec. A comparison of sales by regions for June, 1946 and 1945, is as follows: Maritime Provinces, -1 per cent; Quebec, -5 per cent; Ontario, +9 per cent; Prairie Provinces, +14 per cent; and British Columbia, +12 per cent. June grocery sales fell 7 per cent below the volume of trading in May, while total sales for the first half of the year averaged 11 per cent higher than those made in the first six-month period of 1945.

Fruit and vegetable wholesalers throughout the country shared in the 18 per cent gain in June of this year over last. The western provinces again led with an advance of 26 per cent, followed by Ontario at 13 per cent and the Maritime Provinces and Quebec at 12 per cent. Compared with the preceding month, June sales were 2 per cent lower, while aggregate sales for the January-June period of this year were 24 per cent greater than for the same months of 1945.

Stocks reported on hand by wholesale grocers at the end of June were valued 5 per cent higher than on June 30, 1945, but were 4 per cent below the inventories held on May 31, 1946. Inventories at the beginning of June are normally 20 per cent in excess of the volume of business transacted during that month. Stocks on hand at the beginning of June, 1946, were 1 per cent below the volume of June sales, indicating that the inventory position at the beginning of June this year 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
		June, 1945	June, 1946	June, 1946 over June, 1945	May, 1946	
		\$	\$			
CANADA	70	22,084	23,711	+ 7.4	- 7.0	+11.1
Maritimes	11	3,241	3,197	- 1.4	- 4.9	+ 3.8
Quebec	19	2,949	2,792	- 5.3	-19.1	+ 9.0
Ontario	22	7,101	7,740	+ 9.0	- 8.7	+10.7
Prairies	12	5,713	6,521	+14.1	- 6.2	+14.5
British Columbia	6	3,080	3,461	+12.4	- 0.5	+13.7

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
		June, 1945	June, 1946	June, 1946 over June, 1945	May, 1946	
		\$	\$			
CANADA	47	10,530	12,401	+17.8	- 2.0	+24.0
Maritimes and Quebec .	16	2,468	2,754	+11.6	+10.4	+12.8
Ontario	17	4,031	4,554	+13.0	- 9.9	+19.1
Western Provinces	14	4,031	5,093	+26.3	+ 4.4	+28.4

Retail Sales
Chain Stores

June, 1946 sales of 876 chain store units operated by 25 chain companies in the food retailing field were 8 per cent higher than sales of 887 stores operated by the same 25 firms in June, 1945. Average sales per store in June, 1946 were \$20,985, 9 per cent above the \$19,243 average for the same month of the previous year.

The largest increase in chain food store sales was recorded in British Columbia where trading stood 14 per cent higher than in June, 1945. This was followed closely by the Prairie Provinces with a gain of 10 per cent. Increases elsewhere were 7 per cent in Ontario, 6 per cent in Quebec and 4 per cent in the Maritime Provinces.

Comparison of Stores and Sales for June, 1945 and 1946

	June, 1945		June, 1946		% Change In Sales June, 1946 June, 1945
	No. of Stores	Sales \$	No. of Stores	Sales \$	
CANADA	887	17,068,824	876	18,382,946	+ 7.7
Maritimes	32	517,736	33	538,588	+ 4.0
Quebec	165	3,561,278	164	3,777,612	+ 6.1
Ontario	495	9,176,732	486	9,806,668	+ 6.9
Prairie Provinces ..	103	2,149,648	101	2,365,986	+10.1
British Columbia ...	92	1,663,430	92	1,894,092	+13.9

Independent Stores

Retail sales by independent food stores in June were 5 per cent higher for the country as a whole than in the same month of 1945. Increases in Saskatchewan and Alberta were somewhat higher than the average standing at 13 and 15 per cent, respectively. Other provinces showing smaller gains were Manitoba and British Columbia 9 per cent and Ontario 6 per cent, while Quebec and the Maritime Provinces were practically unchanged from last year.

Comparison of Sales Reported for June, 1945 and 1946

	No. of Stores Reporting	No. Reporting An Increase	% Change In Sales June, 1946 June, 1945
CANADA	1,230	738	+ 5.0
Maritimes	188	85	+ 1.4
Quebec	282	142	- 0.1
Ontario	387	235	+ 6.2
Manitoba	88	63	+ 9.1
Saskatchewan	66	51	+13.3
Alberta	105	87	+14.5
British Columbia ...	114	75	+ 8.8

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