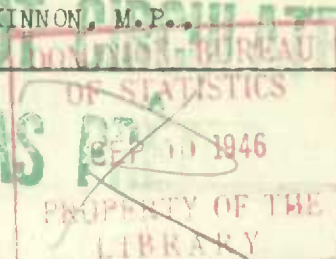


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CURRENT TRENDS IN FOOD DISTRIBUTION, JULY, 1946

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 in July showed substantial increases in volume over July of last year, the wholesale grocery trade advancing 18 per cent while sales in the fruit and vegetable trade were up 15 per cent. These results are based on statements received from 76 of the larger grocery wholesalers and 44 wholesale fruit and vegetable dealers.

The 18 per cent average increase over 1945 in the grocery trade for Canada was a result of fairly constant rises in sales in all parts of the country. Wholesale grocery sales increased 19 per cent in the Maritime Provinces and Ontario, 18 per cent in the Prairies and British Columbia, while only a slightly lower increase of 15 per cent was recorded for Quebec. July sales in the wholesale grocery trade were 9 per cent above those for June, while the first seven months of 1946 showed a gain of 13 per cent over the corresponding period last year.

Sales of fruits and vegetables in Canada in July, 1946 increased 15 per cent over July, 1945 but were practically unchanged from June of this year. Fruit and vegetable sales for the year to date were 22 per cent higher than in the first seven months of 1945. The western provinces and Ontario showed marked increases in sales, the former being up 24 per cent and the latter, 19 per cent. A decrease in sales of fruits and vegetables of 8 per cent was recorded for the Maritime Provinces and Quebec.

Wholesale grocery stocks on hand at the end of July, 1946 were 14 per cent higher than at July 30, 1945, but were valued one per cent below those on hand at the end of June. Inventories at the beginning of July are normally 7 per cent in excess of the volume of business transacted in that month. Stocks on hand at the beginning of July, 1946 were 14 per cent below the volume of July sales, indicating that the inventory position at the beginning of July this year was below the normal situation for that period.

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Wholesale Grocery Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		
		July 1945	July 1946	July, 1946 over July 1945 June 1946		Year-to- date, 1946
		\$	\$			Year-to- date, 1945
CANADA	76	21,930	25,848	+17.9	+ 8.6	+12.7
Maritimes	17	3,079	3,678	+19.4	+12.7	+ 7.7
Quebec	20	3,397	3,908	+15.0	+17.8	+10.7
Ontario	21	6,853	8,145	+18.9	+ 7.0	+12.4
Prairies	12	5,751	6,768	+17.7	+ 9.8	+15.4
British Columbia	6	2,850	3,349	+17.5	- 4.2	+15.7

Wholesale Fruit and Vegetable Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		
		July 1945	July 1946	July, 1946 over July 1945 June 1946		Year-to- date, 1946
		\$	\$			Year-to- date, 1945
CANADA	44	11,799	13,513	+14.5	+ 0.2	+21.9
Maritimes and Quebec .	13	2,792	2,579	- 7.6	-27.9	+ 8.5
Ontario	17	4,262	5,052	+18.5	+ 8.8	+24.7
Western Provinces	14	4,745	5,882	+23.9	+ 9.9	+27.6

Retail Sales
Chain Stores

July, 1946 sales of 869 chain store units operated by 24 chain companies in the food retailing field were 15 per cent higher than sales of 878 stores operated by the same 24 firms in July, 1945. Average sales per store in July, 1946 were \$19,909, 16 per cent above the \$17,216 average for the same month of the previous year.

Quebec chain food store sales registered a greater increase than those in other regions of the country, standing 17 per cent above July, 1945. Ontario followed with a gain of 15 per cent. The other areas, the Prairie Provinces, Maritime Provinces and British Columbia, showed fairly uniform gains of 13 per cent, 12 per cent and 11 per cent respectively.

Comparison of Stores and Sales for July, 1945 and 1946

	July, 1945		July, 1946		% Change In Sales July, 1946 July, 1945
	No. of Stores	Sales \$	No. of Stores	Sales \$	
CANADA	878	15,115,640	869	17,300,586	+14.5
Maritimes	32	502,166	33	562,936	+12.1
Quebec	165	3,102,382	164	3,625,517	+16.9
Ontario	494	8,120,696	486	9,319,270	+14.8
Prairie Provinces ..	95	1,904,479	94	2,150,257	+12.9
British Columbia ...	92	1,485,917	92	1,642,606	+10.5

Independent Stores

Sales of independent food stores for the country as a whole were 9 per cent higher than in July last year. The Prairie Provinces and Ontario somewhat exceeded this average with increases of 15 per cent in Alberta, 14 per cent in Manitoba and 11 per cent in Saskatchewan and Ontario. British Columbia was on a par with Canada, while in the Maritime Provinces and Quebec smaller increases of 8 per cent and 5 per cent were recorded.

Comparison of Sales Reported for July, 1945 and 1946

	No. of Stores Reporting	No. Reporting An Increase	% Change In Sales July, 1946 July, 1945
CANADA	1,228	857	+ 9.1
Maritimes	185	122	+ 7.8
Quebec	290	178	+ 4.5
Ontario	390	282	+11.2
Manitoba	86	68	+14.1
Saskatchewan	68	47	+11.3
Alberta	100	82	+15.4
British Columbia ...	109	78	+ 9.4

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