

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 SECTION
OTTAWA, CANADA

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Vol. 8 - No. 8	16-4050

CURRENT TRENDS IN FOOD DISTRIBUTION, AUGUST, 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 Section 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

Dollar volume of wholesale food sales in Canada continued through the month of August to show increases over the corresponding month of 1945 according to statements received from 75 of the larger grocery wholesalers and 45 wholesalers of fruits and vegetables. Wholesale sales volume in the grocery trade was 19 per cent above that for August, 1945, while sales of fruit and vegetable establishments increased by 12 per cent.

Wholesale grocers in all regions of the country reported increases in sales volume in August this year compared with last. Those in the Maritime Provinces reported a less-than-average gain of 8 per cent over August, 1945, while the largest increase was registered in Ontario where sales were 27 per cent higher in August than in the same month of last year. Wholesale grocery sales were up 17 per cent from 1945 in the Prairie Provinces, 18 per cent in Quebec, and 19 per cent in British Columbia. Compared with July, 1946, sales in the wholesale grocery trade for Canada as a whole increased 3 per cent, while the cumulative total for the first eight months of 1946 was 14 per cent above that for the corresponding period of 1945.

Sales of fruits and vegetables in Canada increased 12 per cent over August, 1945, with the Western Provinces showing the largest gain of 20.5 per cent. Wholesalers of fruits and vegetables in the Maritime Provinces and Quebec reported an increase of 2.5 per cent, while those in Ontario had sales 7 per cent higher than in August a year ago. A 5 per cent decrease in sales from July, 1946 was registered for Canada as a whole, the increase of 13 per cent in the Western Provinces being offset by decreases of 15 per cent in Ontario and 24 per cent in the Maritime Provinces and Quebec. Cumulative sales for the first eight months of 1946 were 20 per cent higher than those for the corresponding period of 1945.

The value of stocks held by wholesale grocers at the end of August, 1946 was 17 per cent higher than at the same date last year, and was only slightly lower than at the end of July. Inventories at the beginning of August are normally 11 per cent in excess of the volume of business transacted during that month. Stocks on hand at the beginning of August were valued 17 per cent below the sales volume for

the month, indicating that the inventory position at the beginning of August this year was considerably below the normal situation for that period.

Wholesale Grocery Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		
		August 1945	August 1946	August, 1946 over August 1945	July 1946	Year-to-date, 1946 Year-to-date, 1945
		\$	\$			
CANADA	75	21,126	25,109	+18.9	+ 2.8	+13.6
Maritimes	16	3,060	3,318	+ 8.4	- 6.9	+ 7.8
Quebec	21	3,316	3,905	+17.7	+ 1.5	+12.2
Ontario	20	5,881	7,464	+26.9	+ 9.4	+14.3
Prairies	12	5,948	6,960	+16.9	+ 1.0	+15.7
British Columbia	6	2,921	3,462	+18.7	+ 2.9	+16.1

Wholesale Fruit and Vegetable Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		
		August 1945	August 1946	August, 1946 over August 1945	July 1946	Year-to-date, 1946 Year-to-date, 1945
		\$	\$			
CANADA	45	10,954	12,253	+11.9	- 4.9	+20.4
Maritimes and Quebec .	17	2,337	2,395	+ 2.5	-24.0	+ 8.3
Ontario	17	3,770	4,018	+ 6.6	-14.7	+22.3
Western Provinces	11	4,847	5,840	+20.5	+13.2	+26.3

Retail Sales
Chain Stores

August, 1946 sales of 870 chain store units operated by 24 chain companies in the food retailing field were 24 per cent higher than sales of 879 stores operated by the same 24 firms in August, 1945. Average sales per store in August, 1946 were \$21,890, 25 per cent above the \$17,500 average for the same month of the previous year.

Sales of chain food stores showed very uniform increases in all parts of the country. The Maritime Provinces, Quebec and Ontario did 25 per cent more business in August of this year than last, while the Prairie Provinces and British Columbia showed gains of 19 per cent.

Comparison of Stores and Sales for August, 1945 and 1946

	August, 1945		August, 1946		% Change In Sales Aug., 1946 Aug., 1945
	No. of Stores	Sales \$	No. of Stores	Sales \$	
CANADA	879	15,382,841	870	19,043,968	+23.8
Maritimes	32	488,551	32	610,625	+25.0
Quebec	165	3,176,835	164	3,983,828	+25.4
Ontario	495	8,157,687	488	10,222,499	+25.3
Prairie Provinces ..	95	2,029,490	94	2,405,566	+18.5
British Columbia ...	92	1,530,278	92	1,821,450	+19.0

Independent Stores

Sales of independent food stores for the country as a whole were 13 per cent higher than in August last year. This gain, however, was surpassed by the Prairie Provinces and Ontario. Alberta lead the other regions with a sales expansion of 22 per cent, while Manitoba followed with an increase of 18 per cent, Ontario and Saskatchewan 15 per cent, the Maritime Provinces and British Columbia 12 per cent and Quebec 9 per cent.

Comparison of Sales Reported for August, 1945 and 1946

	No. of Stores Reporting	No. Reporting An Increase	% Change In Sales August, 1946 August, 1945
CANADA	1,195	928	+13.4
Maritimes	175	127	+11.9
Quebec	265	190	+ 8.9
Ontario	386	301	+15.1
Manitoba	86	77	+17.9
Saskatchewan	67	57	+14.7
Alberta	102	89	+21.5
British Columbia ...	114	87	+12.1

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