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DEPARTMENT OF TRADE AND COMMERCE  
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Dominion Statistician:	Herbert Marshall, O.B.E., B.A., F.S.S.
Director, Division of Census of Industry and Merchandising:	W. H. Losee, B.Sc.
Chief, Merchandising and Services Statistics:	A. C. Steedman, B.A.
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CURRENT TRENDS IN FOOD DISTRIBUTION, SEPTEMBER, 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 Statistics 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

Sales of wholesale grocers in Canada in September, 1946, were 24 per cent higher than in the same month of 1945 and only one per cent below August when the highest volume since this series began was recorded. These figures are based on statements received from 74 of the larger grocery wholesalers in Canada. The gain over last year was general throughout the country, Ontario and Quebec showing the greatest expansion with increases of 31 per cent and 29 per cent respectively. British Columbia wholesalers, with a gain of 26 per cent over September, 1945, had the highest volume of business for any month since the inception of this series. Grocery sales in the Maritime Provinces were 19 per cent higher than last year, but dropped 3 per cent from the August level. Wholesalers in the Prairies, while recording a decrease of 2 per cent from August, had an increase in dollar volume of business over September, 1945, of 16 per cent. The cumulative totals for the year to date indicate that 1946 sales of wholesale grocers in Canada were 15 per cent higher than in the corresponding period of last year.

The dollar volume of sales in the wholesale fruit and vegetable trade in Canada increased 2 per cent over the already high volume of September last year, according to reports received from 48 of the larger dealers. A slight decrease was registered in the Maritime Provinces and Quebec, while sales in Ontario dropped 7 per cent from last year. Wholesalers of fruits and vegetables in the Western Provinces reported an increase of 9 per cent over September, 1945, a considerably less marked increase than the 21 per cent recorded in August, 1946 over 1945. A comparison of August and September sales reveal an increase of 52 per cent in dollar volume in the Maritimes, with a drop of 15 per cent in Ontario and 14 per cent in the Western Provinces. Cumulative sales for the first nine months of 1946 were 18 per cent higher than those for the corresponding period of 1945.

Wholesale grocers' stocks on hand at the end of September, 1946, were valued 27 per cent above those held at the same date last year, and 8 per cent higher than at the end of August. Inventories at the beginning of September are normally 10 per cent in excess of sales for the month. Stocks on hand at the beginning of September this year were valued 16 per cent below the sales volume for that month, indicating that the inventory position at the beginning of September this year was considerably 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		
		Sept., 1945	Sept., 1946	Sept., 1946 over Sept., 1945      Aug., 1946		Year-to- date, 1946
		\$	\$			Year-to- date, 1945
CANADA .....	74	20,364	25,243	+24.0	- 1.2	+14.7
Maritimes .....	17	2,854	3,408	+19.4	- 3.3	+ 9.0
Quebec .....	20	3,214	4,142	+28.9	+ 5.1	+14.2
Ontario .....	19	5,492	7,174	+30.6	- 4.5	+15.5
Prairies .....	12	5,913	6,884	+16.4	- 2.3	+15.8
British Columbia ....	6	2,891	3,636	+25.7	+10.9	+17.2

Wholesale Fruit and Vegetable Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		
		Sept., 1945	Sept., 1946	Sept., 1946 over Sept., 1945      Aug., 1946		Year-to- date, 1946
		\$	\$			Year-to- date, 1945
CANADA .....	48	10,610	10,815	+ 1.9	- 3.1	+18.0
Maritimes and Quebec .	16	2,029	2,020	- 0.4	+52.0	+ 7.1
Ontario .....	18	3,554	3,298	- 7.2	-14.6	+18.8
Western Provinces ....	14	5,027	5,497	+ 9.3	-14.2	+23.9

Retail Sales  
Chain Stores

September, 1946 sales of 868 chain store units operated by 22 chain companies in the food retailing field were 7 per cent higher than sales of 874 stores operated by the same 22 firms in September, 1945. Average sales per store in September, 1946 were \$18,566, 8 per cent above the \$17,222 average for the same month of the previous year.

The largest among the regional increases for chain food stores are in eastern Canadian areas. A gain of 11 per cent in the Maritime Provinces was followed by increases of 9 per cent in Quebec and 7 per cent in Ontario. Increases in the Prairie Provinces and British Columbia fell slightly below the average result.

Comparison of Stores and Sales for September, 1945 and 1946

	September, 1945		September, 1946		% Change In Sales Sept., 1946 Sept., 1945
	No. of Stores	Sales	No. of Stores	Sales	
CANADA .....	874	15,051,985	868	16,115,596	+ 7.1
Maritimes .....	32	457,820	32	508,045	+11.0
Quebec .....	165	3,167,493	165	3,463,841	+ 9.4
Ontario .....	496	7,966,106	492	8,530,895	+ 7.1
Prairie Provinces ..	89	1,956,751	87	2,024,816	+ 3.5
British Columbia ...	92	1,503,815	92	1,587,999	+ 5.6

Independent Stores

Sales of independent food stores in September showed almost the same average increase as did food chains. The pattern of the regional results differs somewhat, however, the larger gains occurring in western sections of the country. Gains in the four western provinces ranged between 7 and 10 per cent. Ontario stores averaged 6 per cent above September, 1945, while increases in Quebec and in the Maritime Provinces amounted to 4 per cent.

Comparison of Sales Reported for September, 1945 and 1946

	No. of Stores Reporting	No. Reporting An Increase	% Change In Sales September, 1946 September, 1945
CANADA .....	1,204	736	+ 5.9
Maritimes .....	176	86	+ 3.9
Quebec .....	277	158	+ 3.7
Ontario .....	376	219	+ 6.4
Manitoba .....	84	62	+ 9.6
Saskatchewan .....	68	50	+ 8.9
Alberta .....	109	78	+ 6.8
British Columbia ..	114	83	+ 8.6

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