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CURRENT TRENDS IN FOOD DISTRIBUTION

NOVEMBER, 1947

This bulletin brings together the information on retail grocery and wholesale grocery and fruit and vegetable sales contained in other monthly bulletins on the retail and wholesale trade thus facilitating a comparison of the trends in monthly sales in the two stages of food distribution.

WHOLESALE TRADE

Grocers' Sales

November sales of 74 of the larger grocery wholesalers across Canada were 23% higher than in November, 1946, bringing the cumulative sales for the 11 months of 1947 to a level 18% in excess of that for the corresponding period of 1946. Compared with October, 1947, dollar volume of grocers' sales showed a drop of 10%.

British Columbia and Ontario continued to record the largest gains over 1946 at 33% and 27% respectively. Cumulative sales for 11 months of 1947 for British Columbia and Ontario were 24% and 19% higher than in the corresponding period of 1946. Increases recorded for the other regions, with the 11-month cumulative per cent change in brackets, are as follows: Quebec, 21% (16%); Prairies, 18% (15%); Maritimes, 17% (14%).

Fruit and Vegetable Dealers' Sales

Dollar sales of fruits and vegetables in Canada were 1% higher than in November a year ago according to statements submitted by 49 of the larger dealers in the country. There was a drop from October of 4%, while cumulative sales for the 11 months of 1947 were 5% below those for the corresponding period of 1946.

A substantial gain over November, 1946, of 18% was recorded by wholesalers in the Maritimes and Quebec combined. Ontario sales were up 2% while in the Western Provinces, sales continued below the 1946 level by 10%.

Grocers' Inventories

Stocks on hand at the end of November, 1947 showed an increase in value of 20% compared with the same date a year ago and were 11% higher in value than at the end of October, 1947. Stocks on hand at the beginning of November are normally 43% in excess of sales in that month. Inventories at the beginning of November this year were valued 7% below November sales.

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Wholesale Grocery Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		
		November 1946	November 1947	Nov., 1947 over Nov. 1946 Oct. 1947		Jan.-to- Nov., 1947
						Jan.-to- Nov., 1946
		\$	\$			
CANADA.....	74	27,687	34,167	+23.4	-10.4	+17.5
Maritime Provinces	14	3,559	4,171	+17.2	-10.9	+14.0
Quebec	20	3,839	4,658	+21.3	- 8.0	+16.0
Ontario	21	8,815	11,234	+27.4	-14.1	+18.8
Prairie Provinces .	13	7,633	9,274	+18.4	- 6.7	+15.3
British Columbia ..	6	3,641	4,830	+32.6	- 8.2	+24.1

Wholesale Fruit and Vegetable Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		
		November 1946	November 1947	Nov., 1947 over Nov. 1946 Oct. 1947		Jan.-to- Nov., 1947
						Jan.-to- Nov., 1946
		\$	\$			
CANADA	49	9,611	9,698	+ 0.9	- 4.2	- 5.0
Maritimes and Quebec.	18	2,223	2,619	+17.8	+24.0	- 1.8
Ontario	18	3,500	3,575	+ 2.1	- 0.4	- 4.1
Western Provinces ...	13	3,888	3,504	- 9.9	-15.5	- 7.5

Retail Trade

Chain Stores - November, 1947 sales of 875 chain store units operated by 28 chain companies in the food retailing field were 43% higher than sales of 874 stores operated by the same 28 firms in November, 1946. Average sales per store in November, 1947 were 28,760, 43 per cent above the \$20,122 average for the same month of the previous year.

The largest increases in chain food store sales occurred in Ontario and British Columbia. Gains of 47% in each of these regions surpassed the 43% advance for the country as a whole. The Maritime Provinces recorded a gain of 40%; Quebec, 37%; and the Prairie Provinces, 32% over November last year.

Comparison of Stores and Sales for November, 1946 and 1947

	November, 1946		November, 1947		% Change, In Sales <u>November, 1947</u> <u>November, 1946</u>
	No. of Stores	Sales \$	No. of Stores	Sales \$	
CANADA	874	17,587,000	875	25,164,900	+43.1
Maritime Provinces ..	43	633,800	45	889,400	+40.3
Quebec	141	2,704,500	140	3,693,200	+36.6
Ontario	490	10,248,600	488	15,051,000	+46.9
Prairie Provinces ...	104	2,230,400	103	2,936,400	+31.7
British Columbia	96	1,769,700	99	2,594,900	+46.6

Independent Stores - Independent stores did 6% more business in November, 1947 than in the same month of last year. In this field also Ontario and British Columbia led with gains of 8% and 9% respectively. All other provinces showed uniform increases ranging from 2% to 5%.

Comparison of Sales Reported for November, 1946 and 1947

	No. of Stores Reporting	No. Reporting An Increase	% Change in Sales <u>November, 1947</u> <u>November, 1946</u>
CANADA	1,155	649	+ 5.6
Maritime Provinces ..	162	72	+ 2.3
Quebec	273	147	+ 4.2
Ontario	359	222	+ 8.0
Manitoba	82	44	+ 5.2
Saskatchewan	63	31	+ 2.3
Alberta	102	53	+ 3.2
British Columbia	114	80	+ 9.4

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