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CURRENT TRENDS IN FOOD DISTRIBUTION

SEPTEMBER, 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 - Sales of wholesale grocers in September 1947 advanced 23% from September 1946 and were 11% above August 1947 according to reports submitted by 74 of the larger wholesalers across Canada. Grocers in British Columbia recorded the largest increase over September a year ago at 30%. Sales in Quebec were up 26% and in the Prairie Provinces, 25%. Wholesalers in the Maritimes and Ontario reported sales 22% and 17% respectively, above last year. Cumulative sales for the first 9 months of 1947 were 15% higher than in the corresponding period of last year.

Fruit and Vegetable Dealers' Sales - Wholesale dealers in fruits and vegetables registered an increase in sales of 1% over September last year but were 6% below August 1947. These figures are based on statements received from 48 wholesale dealers across Canada. Ontario dealers recorded a gain of 9% over September 1946 while sales in the Maritimes and Quebec combined increased 4%. A drop of 4% was registered in the Western Provinces. Cumulative sales for the first 9 months of 1947 were 6% below the volume in the corresponding period of 1946.

Grocers' Stocks - Stocks in the hands of wholesale grocers at the end of September 1947 were valued 22% higher than at the same date last year and 3% higher than at August 31 of this year. Inventories at the beginning of September are normally 10% in excess of sales during that month. Stocks on hand at the beginning of September this year were valued 13% lower than sales in that month.

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Wholesale Grocery Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		
		September, 1946	September, 1947	Sept., 1947 over Sept., 1946	August, 1947	Jan.-to Sept., 1947
		\$	\$			Jan.-to Sept., 1946
CANADA.....	74	26,172	32,181	+23.0	+11.4	+15.2
Maritime Provinces.	16	3,605	4,384	+21.6	+10.9	+11.8
Quebec.....	19	3,609	4,548	+26.0	+27.1	+15.0
Ontario.....	21	8,441	9,905	+17.3	+ 7.8	+15.1
Prairie Provinces..	12	6,884	8,632	+25.4	+ 6.2	+14.4
British Columbia...	6	3,633	4,712	+29.7	+20.2	+21.0

Wholesale Fruit and Vegetable Trade by Economic Divisions

Division	Number of firms reporting	Dollar Sales (add 000)		Per cent change		
		September, 1946	September, 1947	Sept., 1947 over Sept., 1946	August, 1947	Jan.-to Sept., 1947
		\$	\$			Jan.-to Sept., 1946
CANADA.....	48	10,788	10,935	+ 1.4	- 5.8	- 5.7
Maritimes and Quebec	15	1,903	1,974	+ 3.7	- 2.9	- 3.4
Ontario.....	19	3,388	3,700	+ 9.2	-11.9	- 5.1
Western Provinces...	14	5,497	5,261	- 4.3	- 2.0	- 7.3

Retail Trade

Chain Stores - September, 1947 sales of 886 chain store units operated by 28 chain companies in the food retailing field were 43 per cent higher than sales of 891 stores operated by the same 28 firms in September, 1946. Average sales per store in September, 1947 were 26,140, 44 per cent above the \$18,196 average for the same month of the previous year.

Quebec and Ontario led in chain food store sales with increases of 47 and 46 per cent respectively. British Columbia and the Maritime Provinces each recorded a gain of approximately 38 per cent, while in the Prairie Provinces sales advanced 29 per cent. The result for the country as a whole was 43 per cent higher than last year.

Comparison of Stores and Sales for September, 1946 and 1947

	<u>September, 1946</u>		<u>September, 1947</u>		<u>% Change In Sales September, 1947 September, 1946</u>
	<u>No. of Stores</u>	<u>Sales \$</u>	<u>No. of Stores</u>	<u>Sales \$</u>	
CANADA.....	891	16,212,900	886	23,159,900	+42.8
Maritime Provinces....	44	607,400	45	840,300	+38.3
Quebec.....	165	3,463,700	164	5,100,200	+47.3
Ontario.....	486	8,443,100	479	12,297,500	+45.7
Prairie Provinces.....	104	2,116,900	103	2,728,600	+28.9
British Columbia.....	92	1,581,800	95	2,193,300	+38.7

Independent Stores - Independent food stores did 12 per cent more business in September this year than last. Larger increases occurred in Ontario and the western provinces than in the east. Gains ranging from 11 to 16 per cent were recorded in central and western Canada, while Quebec registered a smaller advance of 9 per cent and the Maritime Provinces 7 per cent.

Comparison of Sales Reported for September, 1946 and 1947

	<u>No. of Stores Reporting</u>	<u>No. Reporting An Increase</u>	<u>% Change in Sales September, 1947 September, 1946</u>
CANADA.....	1,158	809	+11.5
Maritime Provinces.....	166	93	+ 6.6
Quebec.....	270	186	+ 9.3
Ontario.....	366	285	+15.7
Manitoba.....	84	53	+10.7
Saskatchewan.....	66	50	+11.2
Alberta.....	99	71	+11.6
British Columbia.....	107	71	+11.8

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