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Data Sources and Trends in Food Retail and Food Services and Drinking Places

Presentation to Canadian Agriculture Food Policy Conference

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Objective

- Overview of Statistics Canada's retail trade and food and drinking places survey programs
- Coverage of the surveys
- Data available
- Trends in the data



Retail trade

- Last link in the merchandise distribution chain
- Retailers are organized to sell merchandise in small quantities to the general public
- Two main types:
 - Store retailers (NAICS 441-453)
 - Food and beverage retailers (NAICS 4451, 4452, 4453)
 - Non-store retailers (NAICS 454)



Food and beverage retailers

- Grocery stores (NAICS 4451)
 - Supermarkets; Convenience stores
- Speciality food stores (NAICS 4452)
 - Meat markets; Fish and seafood markets; Fruit and vegetable markets; Other specialty food stores
- Beer, wine and liquor stores (NAICS 44531)
- General merchandise stores (NAICS 452)
- Health and personal care stores (NAICS 446)

Retail surveys

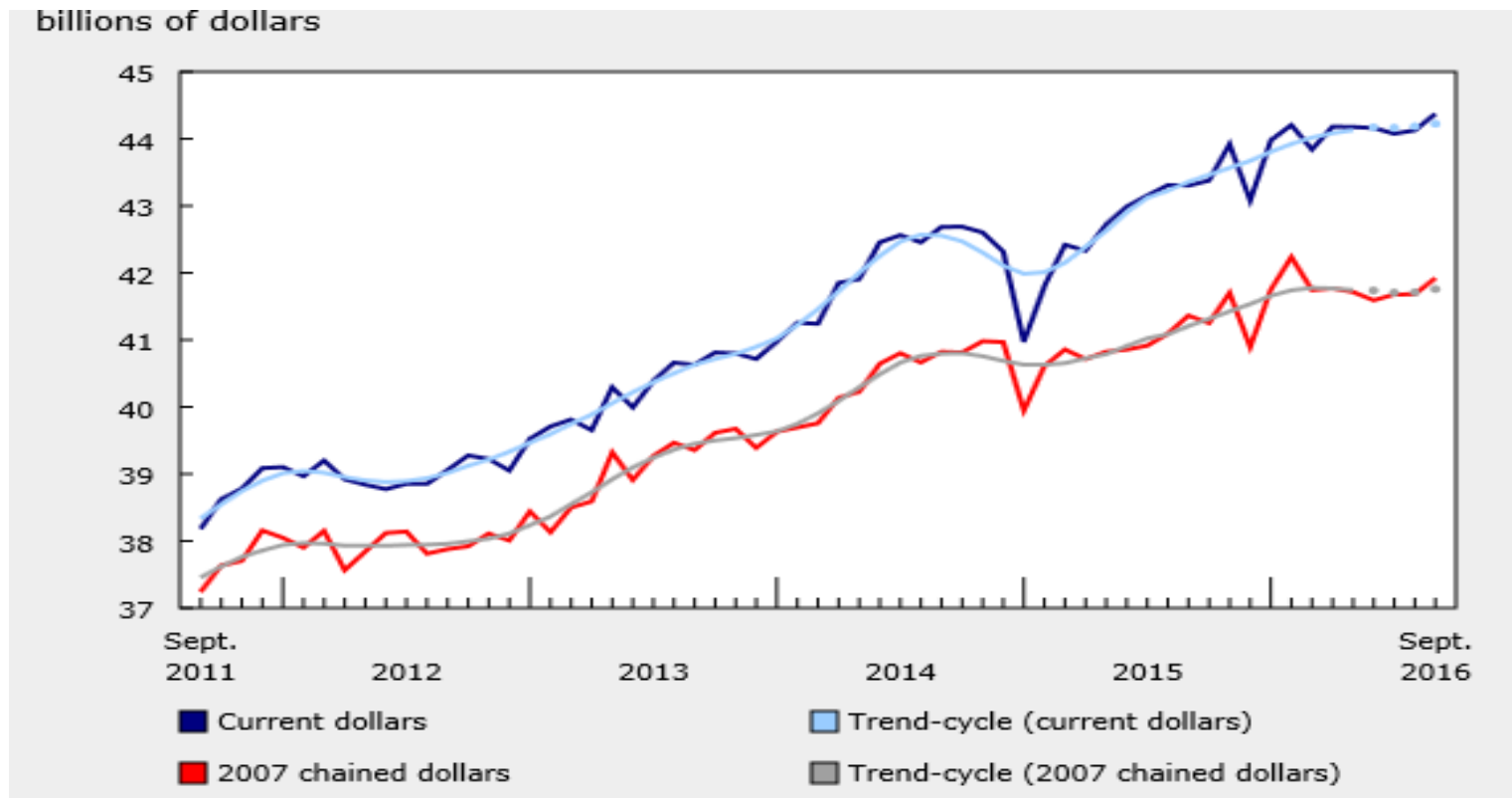
- **Monthly Retail Trade Survey**
 - Collects: total sales and the on-line component of sales; commodities sold, e.g., frozen food,
 - Releases sales monthly and commodities quarterly; sales are released by NAICS; by province; and unadjusted for Toronto, Montreal and Vancouver; commodities are released by NAICS
- **Annual Retail Trade Survey**
 - Collects financial (revenue and expense detail) and characteristics data (client type, method of sale)
 - Releases annually; provincial data by NAICS

About the surveys

- Business Register is the frame for all surveys and the retail population is approximately 276,500 establishments
- Estimates are based on samples
 - Samples are selected to ensure high quality estimates by NAICS and geography (provinces and territories)
 - Number of questionnaires range between 6,500 (annual) and 7,000 (monthly)
- Data are accessible via StatCan website (The Daily, CANSIM)



Retail sales (seasonally adjusted)



Sales by retail industry, thousands (seasonally adjusted)

| North American Industry Classification System (NAICS) | May-16 | Jun-16 | Jul-16 | Aug-16 | Sep-16 |
|--|-----------|-----------|-----------|-----------|-----------|
| Food and beverage stores [445] | 9,765,009 | 9,623,892 | 9,619,919 | 9,643,473 | 9,565,030 |
| Grocery stores [4451] | 7,318,388 | 7,258,496 | 7,287,057 | 7,270,415 | 7,217,155 |
| Supermarkets and other grocery (except convenience) stores [44511] | 6,707,018 | 6,643,979 | 6,676,789 | 6,649,174 | 6,604,703 |
| Convenience stores [44512] | 611,371 | 614,518 | 610,268 | 621,241 | 612,452 |
| Specialty food stores [4452] | 490,444 | 494,237 | 495,879 | 493,436 | 501,267 |
| Beer, wine and liquor stores [4453] | 1,956,176 | 1,871,159 | 1,836,983 | 1,879,621 | 1,846,608 |

Commodities sold (thousands)

| Retail commodity classification | Q2 2015 | Q3 2015 | Q4 2015 | Q1 2016 | Q2 2016 |
|--|-------------------|-------------------|-------------------|-------------------|-------------------|
| Total commodities | 134,892,378 | 135,362,517 | 136,734,716 | 113,588,516 | 139,744,243 |
| Food and beverages | 30,613,096 | 31,345,727 | 31,863,099 | 28,767,042 | 31,226,763 |
| Fresh meat and poultry | 3,576,991 | 3,586,935 | 3,492,437 | 3,300,269 | 3,602,338 |
| Fresh fish and other seafood | 424,163 | 400,853 | 390,307 | 398,896 | 490,688 |
| Fresh fruits and vegetables | 4,083,998 | 3,832,419 | 3,712,186 | 3,855,390 | 4,201,255 |
| Dairy products and eggs | 2,975,259 | 3,033,070 | 3,155,543 | 3,070,138 | 3,120,797 |
| Bakery products (in-house and commercial) | 1,462,614 | 1,491,586 | 1,471,890 | 1,361,635 | 1,508,062 |
| Candy, confectionery and snack foods | 2,092,556 | 2,103,843 | 2,733,884 | 2,196,981 | 2,130,083 |
| Deli, salad bars and prepared foods for take-out | 1,428,365 | 1,474,442 | 1,421,376 | 1,331,529 | 1,492,416 |
| Frozen foods | 1,835,157 | 1,831,160 | 1,852,789 | 1,704,312 | 1,763,616 |
| All other foods | 5,115,476 | 5,171,655 | 5,508,966 | 5,134,154 | 5,089,796 |
| Non-alcoholic beverages | 1,667,008 | 1,759,593 | 1,627,023 | 1,419,234 | 1,632,363 |
| Alcoholic beverages | 5,951,509 | 6,660,171 | 6,496,698 | 4,994,505 | 6,195,349 |

Annual retail trade survey, financial estimates for food and beverage stores (NAICS 445)

| | 2012 | 2013 | 2014 |
|-------------------------------------|-------------|-------------|-------------|
| Total operating revenue (x 1,000) | 108,327,279 | 112,627,409 | 115,532,456 |
| Opening inventory (x 1,000) | 6,118,605 | 6,178,694 | 6,486,237 |
| Purchases (x 1,000) | 78,311,696 | 81,569,721 | 85,344,418 |
| Closing inventory (x 1,000) | 6,355,166 | 6,361,805 | 7,590,741 |
| Cost of goods sold (x 1,000) | 78,075,135 | 81,386,610 | 84,239,913 |
| Total labour remuneration (x 1,000) | 11,860,510 | 12,093,055 | 12,269,194 |
| Total operating expenses (x 1,000) | 23,131,315 | 24,262,873 | 24,479,469 |
| Gross margin (percent) | 27.9 | 27.7 | 27.1 |
| Operating profit margin (percent) | 6.6 | 6.2 | 5.9 |

Food Services and Drinking Places

- Full service restaurants (NAICS 722511)
- Limited service eating places (NAICS 722512)
- Special food services (NAICS 7223)
 - Includes caterers, food service contractors, mobile food services
- Drinking places (NAICS 7224)

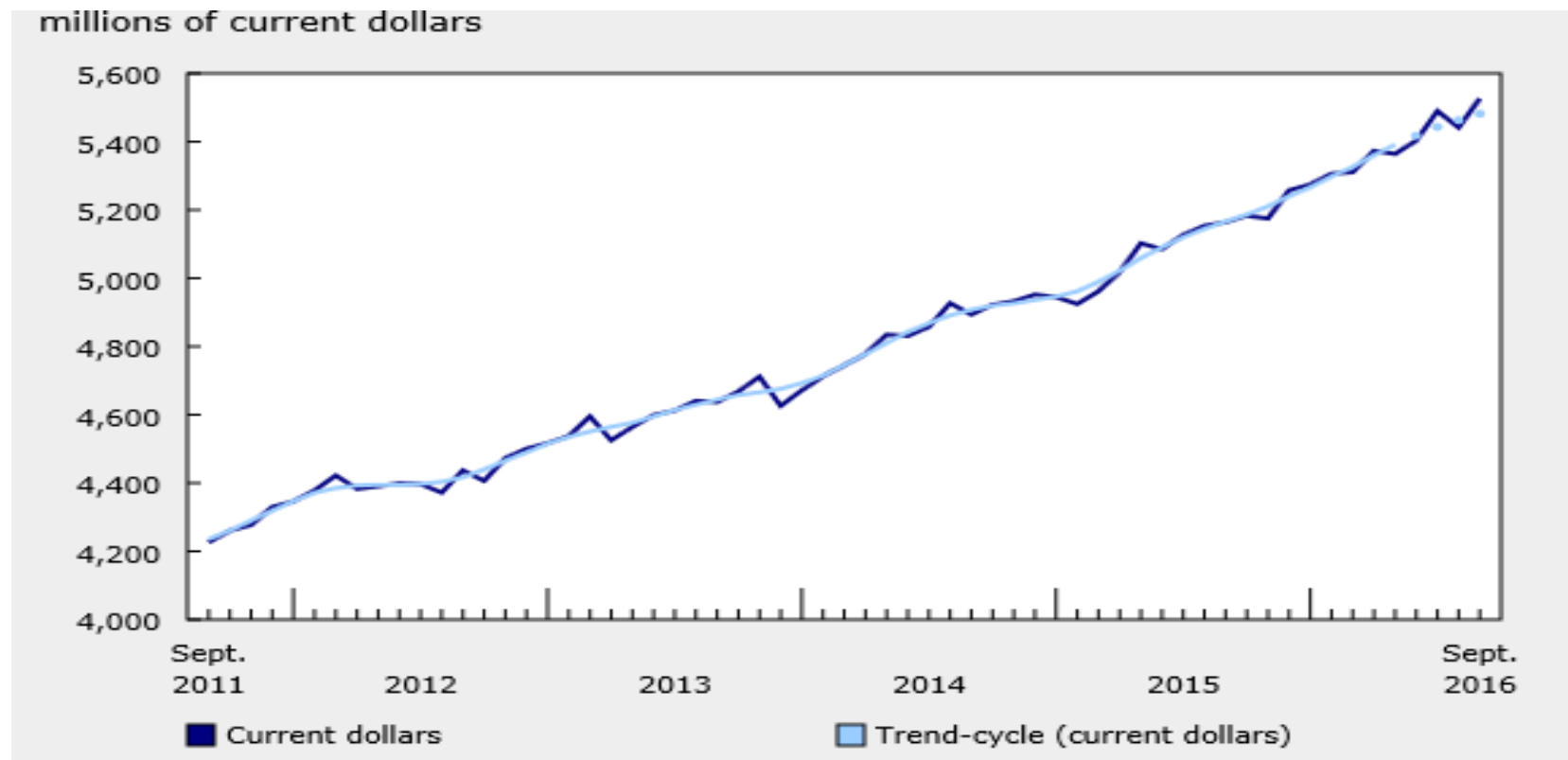
Food and beverage surveys

- Monthly Survey of Food Services and Drinking Places
 - Collects total sales
 - Releases monthly by NAICS and by province
- Annual Survey of Food Services and Drinking Places
 - Collects financial (revenue and expense detail) and characteristics data (commodities sold)
 - Releases annually by NAICS and province

About the surveys

- Business register is the frame and there are approximately 103,300 establishments classified to the food and beverage sector
- Estimates are based on samples
 - Samples are selected to ensure high quality estimates by NAICS and geography (provinces and territories)
 - The sample size is roughly 2,400 questionnaires for both monthly and annual surveys
- Data are accessible via StatCan website (The Daily and Cansim)

Sales in food services and drinking places (monthly)





Monthly survey of food services and drinking places (thousands)

| | May-16 | Jun-16 | Jul-16 | Aug-16 | Sep-16 |
|---|------------------|------------------|------------------|------------------|------------------|
| Total, food services and drinking places | 5,364,229 | 5,403,534 | 5,490,036 | 5,441,363 | 5,526,560 |
| Special food services [7223] | 458,040 | 474,857 | 497,421 | 464,986 | 471,774 |
| Drinking places (alcoholic beverages) [7224] | 199,259 | 200,280 | 198,981 | 201,419 | 203,064 |
| Full-service restaurants [722511] | 2,326,813 | 2,338,023 | 2,396,064 | 2,359,753 | 2,408,651 |
| Limited-service eating places [722512] | 2,380,116 | 2,390,374 | 2,397,570 | 2,415,205 | 2,443,070 |

Food and drinking places, summary statistics, annual

| | 2012 | 2013 | 2014 |
|---|-----------|-----------|-----------|
| Operating revenue (x 1,000,000) | 54,770.20 | 57,804.00 | 60,868.10 |
| Operating expenses (x 1,000,000) | 52,462.40 | 55,337.20 | 58,322.80 |
| Salaries, wages, commissions and benefits (x 1,000,000) | 17,616.90 | 18,202.60 | 18,982.00 |
| Operating profit margin (percent) | 4.2 | 4.3 | 4.2 |

Percentage of Sales by Type of Commodity, annual

| | 2013 | 2014 |
|--|------|------|
| Sales of alcoholic beverages for immediate consumption on the premises | 13.3 | 13 |
| Sales of food and non-alcoholic beverages | 83.9 | 84.1 |
| Other sales | 2.7 | 3 |

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Annual Retail and Annual Food