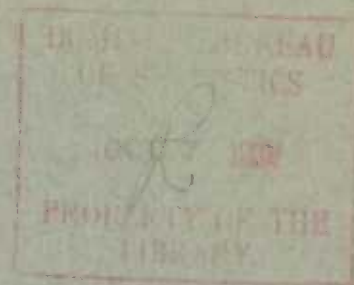


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CANADA
DOMINION BUREAU OF STATISTICS
CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS

THE MARKETING STRUCTURE
OF THE
WHOLESALE GROCERY TRADE
IN CANADA

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TABLE OF CONTENTS

	<u>Page</u>
Introduction	1
I. Manufacturers' Sales Channels	2
II. Wholesale Distribution	3
Kinds of business	4
Geographical distribution	4
Types of establishment	4
Multiple types of wholesaling	5
Size of business	5
Number of marketing units	6
Extent of sales territory	6
Operating expenses	7
(1) Wholesale merchants - general line	7
(2) Wholesale merchants - specialty lines	8
(3) Agents and brokers	8
(4) Chain store warehouses	8
(5) By economic divisions	8
(6) Comparison for 1923 and 1930	9
(7) Analysis for 1923	9
Trend in wholesale grocery sales	9
(1) Trend, 1923 to 1930	9
(2) Trend, 1930 to 1935	10
Gross margin	10
(1) Gross margin for 1935	10
(2) Comparative figures for 1923 and 1935	11
Statistics for wholesalers servicing voluntary chains ..	11
Commodity sales	12
(1) Commodities sold in the groceries and food specialties trade	12
(2) Total commodity sales	13
III. Retail Distribution	14
Summary	14
Chain stores	15
Voluntary chains	15
Operating expenses	15
Gross margin	15
Commodity sales	16

List of Tables

Table 1.--Distribution of Sales of Manufacturers in the Food Industries Group, Canada, 1930	17
Table 2.--Wholesale Groceries and Food Specialties Trade, by Kinds of Business, Canada, 1930	18
Table 3.--Wholesale Groceries and Food Specialties Trade, by Provinces and by Kinds of Business, 1930	19
Table 4.--Wholesale Groceries and Food Specialties Trade - Whole- salers Proper, by Kinds of Business, Canada, 1930	20
Table 5.--Wholesale Groceries and Food Specialties Trade, by Type of Establishment, Canada, 1930	21

	<u>Page</u>
Table 6.--Wholesale Groceries and Food Specialties Trade, by Type of Establishment and Kind of Business, Canada, 1930	22
Table 7.--Wholesale Groceries and Food Specialties Trade, by Provinces and by Type of Establishment, 1930	23
Table 8.--Wholesale Groceries and Food Specialties Trade, Classified According to Amount of Annual Sales, by Economic Divisions, 1930	24
Table 9.--Wholesale Groceries and Food Specialties Trade Classified According to Number of Marketing Units, Canada, 1930	26
Table 10.--Sales-Territory Radius Reported by Wholesalers Proper, General Line of Groceries, by Economic Divisions, 1930	27
Table 11.--Operating Expense Analysis for Wholesale Groceries and Food Specialties Trade, by Type of Establishment, Type of Operation and Kind of Business, Canada, 1930	28
Table 12.--Operating Expense Analysis for Single Independent Establishments in the Wholesale Groceries and Food Specialties Trade, by Size of Business, 1930	30
Table 13.--Operating Expense Analysis for Wholesale Groceries and Food Specialties Trade, by Economic Divisions and Type of Establishment, 1930	31
Table 14.--Wholesale Merchants - General Line of Groceries - Comparison of Operating Expenses for 1923 and 1930, by Economic Divisions ...	32
Table 15.--Wholesalers Proper - General Line of Groceries - Operating Expense Analysis for a Sample Number of Firms in 1923, by Economic Divisions	32
Table 16.--Wholesalers Proper - Groceries and Food Specialties Trade - Total Sales and Indexes of Sales, 1930 to 1935, by Economic Divisions.	33
Table 17.--Gross Margins for Wholesalers Proper in the Groceries and Food Specialties Trade, by Kinds of Business and Economic Divisions, 1935	33
Table 18.--Gross Margins for Wholesalers Proper - General Line of Groceries - by Size of Business, Canada, 1935	34
Table 19.--Distribution of Wholesalers Proper in General Line of Groceries According to Gross Margin Percentage of Sales, by Economic Divisions, 1935	35
Table 20.--Wholesale Merchants - General Line of Groceries - Comparison of Gross Margin Percentages of Net Sales for 1923 and 1935, by Economic Divisions	36
Table 21.--Statistics for Wholesale Grocery Firms Sponsoring Voluntary Chains, Canada, 1935	36
Table 22.--Wholesale Groceries and Food Specialties Trade - Commodity Sales by Type of Establishment, Canada, 1930	37
Table 23.--Principal Statistics of Food Chains in Canada, by Provinces, 1930 - 1935	40
Table 24.--Voluntary Food Chains in Canada, 1930 - 1935	43
Table 25.--Operating Expenses for Retail Food Stores Classified According to Kind of Business, Type of Operation and Amount of Annual Sales, Canada, 1930	44
Table 26.--Sales of Food Commodities (Except Meals) through Retail Stores, by Kinds of Business, Canada, 1930	46

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THE MARKETING STRUCTURE OF THE WHOLESALE GROCERY TRADE IN CANADA

Introduction

The marketing structure for the distribution of groceries, as of other products, is ever changing. Not that the fundamental functions necessary for the effective transference of goods from producer to consumer have been reduced. Concentration of production both in respect to place and time, together with wide distribution and frequently irregular nature of consumer markets, have created a situation requiring the services of some go-between. Contacts between buyers and sellers must be made. Goods must be sorted, graded and packed in quantities suitable for the needs of the consumer, be he large or small. Merchandise produced only at certain seasons of the year must be held in stock to meet the requirements of a more uniform demand and transportation between place of production and consumption must be effected. Some agency must bear the risks and expenses incident to the performance of these and other tasks.

Changes in methods of distribution of grocery products in Canada consist largely in the way in which these services and their costs have been divided amongst the manufacturer, wholesaler and retail merchant. The producer, through the use of manufacturers' sales branches or manufacturers' agents, has attempted to reach forward past the wholesale merchant making direct contact with the retail field. The retailer, through the development of the chain store, has reached backward in the distribution process making direct contact with the producer. The wholesaler, in an endeavour to improve his competitive position in the face of these two movements, has combined with other wholesalers or has built around himself a group of retail merchants in the form of voluntary or co-operative buying chains. Sometimes credit and delivery services have been eliminated giving rise to the cash-and-carry wholesaler. Manufacturers' brands, wholesalers' brands and retailers' private brands, together with extensive advertising programs, have all played their part in molding the form of the distribution structure as it exists at any given time.

Comprehensive statistics suitable for the study of distribution problems in Canada were very meagre until 1930, when a complete Census of Merchandising and Service Establishments was taken in connection with the Seventh Decennial Census. Annual surveys of retail and wholesale trade, arising out of the complete census and based on the sampling principle, show the provincial trends in sales for recent years. Results of a partial survey made in 1923 are also available but data for the period between that year and 1930 are lacking. This report consists chiefly of a description of the form and extent of the wholesale grocery trade as revealed in the wholesale trade statistics for 1930. Data on retail trade and on the distribution of manufacturers' sales are included only to the extent of rounding out and completing the analysis of the wholesale field while results of the annual surveys, together with those of the partial study for 1923, are also included whenever it is thought that they throw further light on the subject under review.(1)

Were the three-party system of distribution - manufacturer, wholesaler, retailer - universal then it might be possible to trace the flow of goods from producer to consumer and to observe their appreciation in value at each stage. Distribution,

(1) In 1934 a special report was published dealing with the retail grocery trade, "Food Retailing in Canada, 1930". This report is now out of print.

however, is not reducible to this simple three-stage process. Part of the goods manufactured within the country are for export and never enter the domestic field. Goods pass from one manufacturer to another as equipment or supplies. Duplication in sales exists within the wholesale field itself. Sales of importers and of many large wholesalers are made partly to retailers, partly to other wholesalers and partly to manufacturing firms.

While the complexity of the distributive system is such as to prohibit its complete analysis by other than a most intensive and exhaustive survey, the census figures are illuminating from many points of view. A wealth of material is available descriptive of the general marketing structure of the country. Average operating results are provided by which individual retailers and wholesalers can compare their own performance. Bases have been established for determining potential markets for commodities in different sections of the country.

I

MANUFACTURERS' SALES CHANNELS

The first stage in the distribution process consists of the marketing channels used by manufacturers themselves, data on which were secured for 1930 by means of a special inquiry made direct to the manufacturing plants. All Canadian manufacturers were asked to break down their total sales for 1930 to show the approximate proportions of the total sold to the following:

- (1) Manufacturers' wholesale branches - i.e., wholesale branches operated directly by manufacturing plants
- (2) Other wholesale houses
- (3) Manufacturers' retail branches
- (4) Other retailers
- (5) Industrial and other large consumers
- (6) Household consumers
- (7) Export sales

The statistics thus secured relate only to the first stage of distribution and do not indicate the final destination of the products. Few firms maintain separate records of sales made to these different distribution channels and, in addition, each manufacturer was left to classify his own customers into the various categories. On account of the dual nature of some firms in the wholesale trade, it would not be surprising if, in some instances, the same firm were classified differently by various manufacturing plants. These considerations should be kept in mind in interpreting the distribution of sales of manufacturers of food products as given in Table 1.

Returns for all manufacturers in the food industry in Canada for 1930 show that direct sales to retailers (other than manufacturers' retail branches) at 29.8 per cent of the total were greater than those made to any one of the other channels of distribution mentioned above. The inclusion of sales for the slaughtering and meat packing industry, whose products do not come under the grocery classification, considerably accentuates the importance of direct sale to retail merchants. When data for this industry are excluded, the distribution of sales for the remainder of the food products industry was as follows: 32.7 per cent to wholesalers other than manufacturers' wholesale branches, 24.2 per cent to retailers other than manufacturers' branches, 15.9 per cent to household consumers, 10.9 per cent for export, 9.2 per cent to industrial or other large consumers, 5.9 per cent direct to manufacturers' wholesale branches and 1.2 per cent to manufacturers' retail branches.

Conditions within the food industry varied widely for different trades. In the bakery products industry, direct sale to household consumers was most prevalent, accounting for 70.1 per cent of the total output. On the other hand, sugar refineries sold 79.4 per cent of their output to wholesalers other than their own branches. Wholesalers also occupied a prominent position in fruit and vegetable preparations industry, in the fish curing and packing industry and in the distribution of butter and cheese. Direct sale to retailers was prevalent in the biscuits, confectionery and cocoa industry and also in the coffee, tea and spices industry. Flour and feed mills used all channels of distribution in significant proportions. Manufacturers' wholesale branches took 6.6 per cent of the output and other wholesalers another 25.5 per cent. Manufacturers' own retail branches were utilized to the extent of 1.5 per cent and other retailers to the extent of 15.7 per cent. Sales to industrial consumers (chiefly bakeries) amounted to 18.7 per cent and to household consumers (chiefly farmers), 5.3 per cent; 26.7 per cent of the total output was exported. Malt and malt products were sold to the extent of 81.7 per cent to industrial consumers, a class which also absorbed 22 per cent of the production of salt. Details for the various food industry groups are given in Table 1.

II

WHOLESALE DISTRIBUTION

Wholesale trading is not new. In ancient days the term was associated chiefly with the movement of goods over long distances by caravan or with foreign trade. About the 15th Century the wholesaler commenced to assume more importance in the domestic field; in fact he took a leading part in organizing and financing production in addition to servicing the retail merchant. With the industrial revolution and the development of the factory system in the 19th Century, the wholesaler ceased to be the organizer of production and confined his efforts to the development of more widespread markets. With rapid advances in methods of production in recent years due to the extension of scientific research even the producer too has been forced to shift his emphasis from production to distribution. He must face the question of not only how much can he produce but how much can he sell, a problem which has led to his attempting a more direct contact with the consumer market.

But there is clearly a limit to the degree to which the stages of distribution can be cut down. Results of the Census of Merchandising and Service Establishments for 1930 show that in that year there were more than 23,000 grocery stores in Canada. There were also almost 12,000 country general stores located in the smaller towns and rural areas and in which the sale of grocery items was of considerable importance. When it is remembered that the average grocer is said to carry from 1,000 to 3,000 stock items, some idea of the task of assembly to be performed for the retail trade is readily acquired.

Results of the 1930 Census show that there were altogether 13,140 wholesale trading establishments in Canada that year with \$3,325,210,300 sales. Included in these totals were 967 firms with \$465,629,200 sales which dealt mainly in grocery products and which were classified for census purposes as wholesalers in the groceries and food specialties trade. Total sales for wholesalers in the groceries and food specialties trade are not synonymous with sales of grocery commodities. These goods are sold to some extent by dealers specializing in other than grocery commodities and included under other trade groups. Nor were the 967 establishments in the grocery trade confined exclusively to the sale of grocery products. Non-food commodities - such as household soaps, laundering and cleaning supplies and other related lines - are frequently carried although in lesser amounts.

In this report the groceries and food specialty trade is not synonymous with the food trade as a whole. The groceries and food specialties included here are chiefly those food products which have undergone some processing and manufacturing and which are commonly known as grocery items in the trade. Firms dealing in staples - such as tea, coffee, chocolate, flour, sugar, salt, packaged and canned goods as well as cereal preparations, jams and jellies - are included. The report does not cover dealers specializing in the sale of dairy or poultry products, fresh fruits and vegetables or meat and meat products.

Kinds of Business.--All wholesalers coming within the purview of this study fall into two major groupings. The first group includes those firms dealing in a comparatively full line of groceries while the second group includes establishments which specialize in a single commodity such as sugar, or a group of related commodities such as tea, coffee and spices; jams, jellies and pickles or flour and feed. General line wholesale grocers comprised 504 establishments whose sales were \$323,931,000 or 69.6 per cent of the total for the grocery trade as a whole. The specialty houses comprised 463 establishments with \$141,698,200 sales and included 87 flour and feed merchants with \$39,176,900 sales, 14 sugar wholesalers with \$18,016,700 sales, 74 specialists in tea, coffee, spices and cocoa with \$16,055,400 sales and 42 distributing points for biscuits and crackers (mainly manufacturers' sales branches) with \$8,538,200 sales. Details for other specialized lines are shown in Table 2.

Geographical Distribution.--A classification of the 967 wholesale grocery firms on the basis of geographical location shows that Ontario occupied first place with 327 establishments and 35.1 per cent of the total sales. Quebec was next with 216 wholesale establishments and 26.2 per cent of the total Dominion sales followed by British Columbia with 97 establishments and 8.8 per cent of the sales. There were 175 wholesale grocery houses in the Prairie Provinces and 152 in the Maritimes, while the proportions of the total sales transacted in these divisions were 21.2 per cent and 8.7 per cent respectively.

The geographical distribution provides information on the basis of location of establishment rather than on the destination of goods sold. This fact is reflected in a comparison of percentage distributions of population and wholesale grocery sales as given in Table 3. While in a general way distribution of sales for general line wholesalers parallels that of population, the correspondence in the case of specialty lines is much less marked especially in the Prairie Provinces and also in Quebec. In the latter province the proportion of sales considerably exceeds that of population. This may be explained by the concentration of a number of large specialty houses in Montreal which serve other provinces in addition to Quebec.

Types of Establishment.--The great diversity in the manner in which wholesalers operate requires a second classification termed "Classification According to Type". There are several bases for this classification: (1) according to ownership of the goods, distinguishing between those firms which take title to the goods and those which do not, (2) according as firms are engaged in domestic or foreign trade, (3) according to the ownership of the establishment, distinguishing between those owned and operated by manufacturing firms and those not thus connected, (4) according as to whether a wholesaler operates at large or is more or less closely associated with one manufacturing firm. Other bases of classification might be mentioned but these are sufficient to indicate the multiplicity of types of operation in the wholesale field.

All types may be combined into two main groups: "Wholesalers Proper", and "Other Wholesalers". "Wholesalers proper" carry on the complete functions of wholesale merchants: buy in bulk and sell in smaller lots, provide warehouse and delivery services, solicit orders through salesmen, provide market information and extend credit

service. The other group of wholesalers includes manufacturers' sales branches, manufacturers' agents, chain store warehouses and various types of agents and brokers.

Out of the 967 wholesalers in the groceries and food specialties trade in Canada in 1930, wholesalers proper comprised 562 establishments whose total sales were \$223,838,000 or 48.1 per cent of total for the trade. The wholesalers proper group includes both regular wholesale merchants, of which there were 484 with \$204,928,200 sales, and also 78 firms like cash and carry wholesalers, exporters, importers, wagon distributors and drop shippers, whose annual sales were \$18,909,800.

In the "Other wholesalers" group, manufacturers' sales branches and the various types of agents and brokers were of most importance; there were 183 of the former with \$72,171,700 sales and 180 of the latter with \$75,573,700 sales. Chain store warehouses numbered 24 with \$67,893,700 sales but this amount does not anything like represent the value of merchandise transferred to retail chain stores. Some chains do not operate a warehouse at all, while in other cases the company warehouse carries only part of the stock required.

A cross classification between types of establishment and kind of business shows that, while wholesalers proper predominate in the general line trade, "Other wholesalers" occupy a leading position in the specialty lines. This is due to the fact that manufacturers' sales branches and frequently agents and brokers are closely associated with one manufacturing firm and handle in large quantities one particular commodity which they sell in smaller lots to the chain store warehouse, to the regular wholesaler or direct to the retail trade. Details regarding the relationship between types of establishment and kind of business are given in Table 6.

Multiple Types of Wholesaling.—Some wholesalers serve in a dual or triple capacity in so far as the functions which they perform are concerned. The schedules used in the Census of Merchandising provided for an inquiry into the degree to which wholesalers did assume more than one function and, although it is probable that some firms did not give complete information on this subject, the results are indicative of the more common groupings of activities in the wholesale trade. Altogether, 125 out of the 767 wholesalers in the groceries and food specialties trade reported that they traded on more than one basis. Out of 31 regular wholesale merchants reporting a multiple form of operation, 20 indicated that they did some importing while 7 reported that they acted as agents of various types. Conversely, importers sometimes reported a small amount of domestic business in addition to their foreign trade. In other cases, the functions of brokers and agents were combined while in yet other cases import agents, in addition to acting for their principals, also imported some merchandise on their own account thus assuming the functions of regular import merchants.

Size of Business.—A surprising feature of the wholesale grocery trade is the large number of establishments with limited sales volume. Out of the 967 establishments in the entire trade there were 114 whose annual sales for 1930 did not reach the \$25,000 mark and there were another 106 whose sales ranged between \$25,000 and \$50,000. In fact, one-third of all establishments in the wholesale groceries and food specialties trade had annual sales below \$100,000. There were 112 large firms each having \$1,000,000 sales or more and whose aggregate business formed 55.2 per cent of the total for the trade. It should be noted in this connection that the Census of Merchandising was based on establishments, not on companies. That is to say, a separate report was required for each sales establishment, large firms operating numerous branches in different parts of the country being required to furnish a separate report for each.

The small scale of operations of some grocery wholesalers as reflected in the Census of Merchandising results may be partially explained by the technique used in classifying the returns from the various firms. Every firm was classified either as a

wholesale or a retail business. Some firms, generally intermediate in size between retail and wholesale establishments, reported that they operated on both bases so that it was necessary to classify them as one or the other according to the basis on which the larger proportion of sales was made. Thus it is that a number of firms would be classified as wholesale establishments although a substantial proportion of their business was done on a retail basis.

But even when all firms of such dual nature are omitted there remains a considerable number with but small sales volume. These small-scale businesses are found operating in the food specialties field to a much greater extent than amongst general line wholesalers. Only 16 general line wholesalers out of 502 were in the less than \$25,000 class, while in the specialty field the proportion was 98 out of 463. Less than 17 per cent of all general line wholesalers had annual sales of less than \$100,000 while for specialty lines the ratio was almost 54 per cent. Jobbers in tea, coffee and spices account for a considerable number of these small wholesale houses as do also wholesale merchants in flour and feed. Table 8 presents a classification of firms according to size of business and gives separate details for general line and specialty wholesalers, first for the Dominion as a whole and then for each of the five economic divisions of the country. The smaller concentration of the wholesale business amongst the larger firms is especially noticeable in the Maritime Provinces as compared with other regions. Further reference to this factor will be made again in the section on operating expenses.

Number of Marketing Units.--The chain store type of operation is not new nor is it restricted to the retail merchandise field. There are chains of hotels, banks, investment houses and manufacturing plants so that it is not surprising to find that the system has also extended into wholesale trade. Multiple organization in the wholesale field is the result of one of three developments: (1) the establishment of one or more branch warehouses by a parent wholesale firm in an endeavour to broaden the geographical limits of its market or reduce transportation charges, (2) the amalgamation of previously existing independent wholesalers in order to improve the competitive position of the organization as a whole in view of the rapid strides made by the retail chain, and (3) the establishment of manufacturers' sales branches by manufacturing firms.

Out of the 967 wholesale grocery houses in Canada in 1930, 519 or 53.7 per cent were single independent establishments and these accounted for 43.1 per cent of the total sales. There were 60 establishments belonging to two-unit firms, 108 establishments belonging to firms with from 3 to 5 units each and 196 establishments belonging to companies with from 6 to 25 units each. Three companies each with more than 25 units operated a total of 84 branches and transacted 6.2 per cent of the total wholesale grocery trade.

Due to the position occupied by manufacturers' sales branches in the trade, the multiple organizations are of more importance amongst "Other wholesalers" than amongst "Wholesalers proper". In the latter group single independent establishments formed 63.5 per cent of the total number and transacted 51.8 per cent of the total sales whereas amongst "Other wholesalers" the single type formed only 40.3 per cent of the total number and had 35.1 per cent of the sales. Details are given in Table 9.

Extent of Sales Territory.--The census schedule for 1930 contained an inquiry in answer to which each wholesale establishment was asked to indicate in a general way the extent of its sales territory. Since the manner of reporting varied for individual firms, it was necessary to assign the answers to this inquiry to one or another of general groupings which were taken as: (1) City, (2) within 25 mile radius, (3) within 75 mile radius, (4) part of a province, (5) entire province, (6) two provinces, (7) region (Prairie Provinces or Maritime Provinces), (8) Dominion, (9) Canada and foreign. Although not all firms furnished this information, results have been tabulated for 278 of the 361 wholesalers proper dealing in a general line of groceries and are shown in Table 10.

Only 23 or 8.3 per cent of the 278 firms reporting indicated that their activities were confined to a single town or city. Another 58 firms or 20.9 per cent of the total reported that they covered a 25 mile radius, probably a central marketing area with its suburbs and immediately surrounding villages. These two types together transacted only 20.5 per cent of the total trade. There were 78 firms operating within a 75 mile radius; 56 more covered a section of a province, while there were 26 establishments which reported a provincial wide territory. These three types together accounted for 57.7 per cent of the total trade which, when added to the 20.5 per cent for local firms, gives 78.2 per cent as the proportion of the total trade for this type and kind of business which is transacted by establishments trading only within one province. The remaining 37 firms with 21.8 per cent of the total sales reported that they had either interprovincial or export trade although, no doubt, a large part of their business was with customers within their own province.

It should be noted that this analysis is based on establishments, not on companies. Some companies had branches in several provinces, but since a sales territory was assigned to each branch the sales of the company as a whole would not appear as interprovincial trade except to the small extent that individual sales territories overlapped more than one province.

OPERATING EXPENSES

The schedules used for the Census of Merchandising asked that each firm report its operating expenses for 1930 under the following headings: salaries and wages of employees, salesmen's expenses, rent, interest on money borrowed for current business operations, and "all other expenses". For this report, however, all items except salaries and wages have been grouped under the heading "Other Expenses" and so appear in the tables. Although information furnished by each firm for payroll and rent was generally complete, a few firms were unable to give accurate data for other operating expenses. The lack of uniformity in accounting practices is such that, although instructions were given to include in the "Other Expense" column all payments other than wage costs, considerable differences would probably be found in the items included. However, the figures presented here covering the groceries and food specialties trade are believed to be fairly accurate. Operating expenses vary so widely according to the number of wholesale functions performed and the range of commodities handled that it is necessary to consider ratios for each type of firm separately.

Wholesale Merchants - General Line.—Operating expenses for wholesale merchants handling a general line of groceries averaged 8.4 per cent of sales in 1930 and were slightly lower for single independents than for multiple establishments, being 8.3 per cent of sales for the former and 8.5 per cent for the latter. Although too much confidence in small differences in expense ratios to sales is not warranted, yet the results show that no economies in operating expenses in proportion to sales were effected by the multiple form of operation. Salaries and wages formed more than half the total expense cost, this item alone forming 4.6 per cent of sales for the group as a whole. Selling expenses (by which are taken to mean expenses of salesmen other than salaries, wages or commissions) formed .6 per cent of sales. Interest on money borrowed for current business operations amounted to .4 per cent of sales while all other expenses, including rental costs, amounted to 2.8 per cent.

An expense analysis for different size of business classes shows that operating expense ratio to sales falls off sharply from 11.8 per cent for firms with less than \$100,000 annual sales to 8.2 per cent for firms in the \$100,000 - \$500,000 class. Beyond this limit, operating expense ratio remained comparatively constant at 8.3 per cent for a group of firms with sales between half a million and a million dollars and 7.9 per cent for a group of 19 firms in the million dollar class. Apparently beyond a certain sales volume any additional turnover (possibly through the development of more

extensive sales territory) is only achieved at the cost of a proportionate increase in operating expense. That is to say, the operation of the business after a certain point has been reached seems to follow the law of constant costs.

Wholesale Merchants - Specialty Lines.—Wholesale merchants dealing in grocery specialties required an operating expense ratio of 14.7 per cent of sales as compared with 8.4 per cent for general line wholesalers. An examination of the individual returns shows that the much higher expense ratio in the specialty field may be explained perhaps entirely by the more exhaustive processing activities carried on by some of these firms.

Agents and Brokers.—Operating expenses for agents and brokers averaged 2.9 per cent of sales for the group as a whole and varied from 2.7 per cent for single independents to 3.3 per cent for multiple firms. The lower expense ratio for agents and brokers reflects the less exhaustive nature of the functions which they carry on compared with wholesalers proper. These types are primarily engaged in arranging for the purchase or sale of commodities on others' account. As a rule, no stocks are carried; average of the year-end stocks for agents and brokers amounted to only 1.7 per cent of annual sales of these firms while for general line wholesalers the corresponding ratio was 13.1 per cent and for specialty wholesalers it was 9.3 per cent.

Since agents and brokers are not concerned to any extent in the physical handling of the goods or with the holding and transportation costs attendant on such functions, it is evident that an increase in business in this case does not necessarily imply a corresponding increase in operating expense. This is revealed in the analysis of operating expenses for agents and brokers classified according to sales volume as given in Table 12. Starting with the high ratio of 9.7 per cent of sales for a group of small firms each with less than \$100,000 business, operating expenses fell off sharply to 2.7 per cent for the next size class comprising 56 firms each with sales of from \$100,000 - \$499,999. The ratio declined to 2.5 per cent for firms with annual sales between half a million and a million dollars and fell off again to 2.0 per cent for firms over the million dollar mark.

Chain Store Warehouses.—Chain store warehouses are wholesale establishments maintained by retail chains as distributing depots from which the units in the chain are stocked with merchandise. Some chain companies maintain a head office organization in the warehouse premises so that operating expenses for chain store warehouses as reported to the Census of Merchandising may include a certain proportion of expense items which should be attributed to general supervision of both the wholesaling and retailing activities carried on.

Sales for 21 grocery chain store warehouses for 1930 were \$64,396,200 or averaged more than \$3,000,000 each. Operating expenses as reported averaged 3.5 per cent of sales, including salary and wage cost, 2.1 per cent, and other operating expenses, 1.4 per cent.

Operating Expenses by Economic Divisions.—Operating expense in proportion to sales for wholesale general line grocers increased from East to West according to results presented in Table 13. In comparison with the Dominion average expense ratio of 8.3 per cent of sales, corresponding figures for the various economic divisions are as follows: Maritime Provinces, 9.7 per cent; Quebec, 8.6 per cent; Ontario, 8.1 per cent; Prairie Provinces, 7.8 per cent, and British Columbia, 7.7 per cent. Differences in the proportions of single and independent and multiple establishments do not account for this trend. Separate data for the two types reveal the same consistent tendency towards lower expense ratios from East to West, figures for multiple firms in each division of the country being at the same time higher than the corresponding data for single unit firms.

Differences in expense ratios to sales may be explained partly at least by differences in the scale of operations of wholesale grocers in the various regions of the country. Average sales per establishment also increased from East to West and, while the regional averages in all cases were fairly high, the Eastern Provinces do contain a larger proportion of smaller firms. But even differences in size of business do not appear to tell the whole story. More detailed analysis shows that operating expenses for the largest establishments in the Maritime Provinces were higher than for the same size classes in other parts. Differences in degree of processing and packing carried on or differences in relative proportions of different commodities handled, as well as in extent of sales territory, average size of order placed and other factors must all be reckoned with in this connection.

Comparison of Operating Expenses, 1923 and 1930.--Results of the partial survey of trading establishments made for 1923 furnish some basis for comparisons of operating expenses in the wholesale grocery trade. Ratio of expenses to sales for general line wholesalers varied but little for the two periods averaging 7.9 per cent for 1923 compared with 8.3 per cent in the later year. Operating expenses in the Maritime Provinces increased from 8.0 per cent for 1923 to 9.7 per cent for 1930 but in all other divisions there was but little change. The Quebec ratio remained unchanged at 8.6 per cent; that for Ontario increased from 7.6 per cent to 8.1 per cent, while combined figures for the Prairie Provinces and British Columbia for 1923 give a ratio of 7.6 per cent compared with ratios of 7.8 per cent and 7.7 per cent for these two divisions in 1930. Comparisons of operating expenses by economic divisions for the two periods are given in Table 14 together with the average annual sales of the firms on which the analysis is based. In both periods the expense ratio is seen to vary inversely with average sales per establishment.

Operating Expense Analysis for 1923.--The schedule used in the Census of Trading Establishments for 1923 called for a more detailed breakdown of operating costs than that secured for 1930. Wage costs formed more than half the total expense figure amounting to 4.57 per cent of sales. Delivery costs were the next largest single expense item at .64 per cent. Taxes came next with .32 per cent followed by rental costs at .22 per cent. (Rental cost ratio is related to total sales of all firms rather than to sales of only those firms occupying rented premises.) Insurance costs formed .21 per cent of sales and advertising, another .13 per cent. Expense details by economic divisions for 1923 are given in Table 15.

TREND IN WHOLESALE GROCERY SALES

Trend, 1923 to 1930.--Although a complete coverage of all trading establishments was not secured for 1923, a careful check of the returns for that year reveals that in the wholesale grocery field from Ontario eastward only a very few firms were missed. On estimating figures for these isolated cases, it is possible to secure totals for 1923 which, while not exact, are sufficiently accurate as to give some indication of the trend in sales between that period and 1930. The number of firms in the Western Provinces for which returns for 1923 are lacking is unfortunately too large to permit a similar procedure being followed.

Results of this comparison reveal a 12.4 per cent decline in sales between 1923 and 1930 for wholesalers proper in the groceries and food specialties trade in Central and Eastern Canada. The decline in the Maritime Provinces was 10 per cent; Quebec sales were down 16 per cent, and Ontario, 11 per cent.

Decrease in sales of regular wholesale grocers in the period 1923 to 1930 must be attributed partly at least to the rise in the chain store form of distribution and the consequent transfer of business from the wholesaler to the chain store warehouse. Price changes must also be considered. The Bureau's wholesale price index for

foods, beverages and tobacco was 22.8 per cent lower for 1930 than for the earlier period. That the decline in value of sales for wholesale grocers was not even greater must be attributed to the considerable expansion in the total volume of food products consumed as reflected in an estimated 23 per cent increase in sales of retail food stores during the same period.

Trend, 1930 to 1935.—Annual surveys of wholesale trade for years following 1930 show that the dollar value of sales for wholesalers proper in the groceries and food specialties trade declined 20.6 per cent between 1930 and 1932. Recovery commenced in 1933 and continued throughout the following two years brought the dollar value of sales for 1935 back to within 10 per cent of the 1930 figure. Preliminary compilations for 1936 show a further improvement of 7.7 per cent in that year as compared with 1935.

Comparison of indexes of sales of wholesalers in the groceries and food specialties trade and the Bureau's Wholesale Price Index for foods, beverages and tobacco, while not strictly valid, is yet sufficiently so to show that the decline in sales may be more than accounted for by price changes. Comparison of the two sets of indexes is shown below:

Comparison of Indexes of Sales for Wholesalers Proper
in the Groceries and Food Specialties Trade and Wholesale
Price Indexes for Foods, Beverages and Tobacco

(1930 = 100)

<u>Year</u>	<u>Index of</u> <u>Sales</u>	<u>Index of</u> <u>Prices</u>
1930	100.0	100.0
1931	87.7	75.6
1932	79.4	66.1
1933	82.4	68.5
1934	87.8	74.9
1935	90.8	75.6

Trend in wholesale grocery sales between 1930 and 1935 varied widely for different sections of the country. While sales declined almost 30 per cent in British Columbia during the two-year interval 1930 to 1932, the Prairie Province sales fell off only about 14 per cent. The smaller decrease in this case reflects the earlier impact of depression conditions in these parts. A considerable portion of the decline in the Prairie Provinces had already taken place before the year to which the census data relate. Value of sales for wholesalers proper in the groceries and food specialties trade, together with indexes of sales for the various divisions of the country for the period 1930 to 1935 are given in Table 16.

GROSS MARGIN

Gross Margin for 1935.—Data relating to gross margins were secured in connection with the annual survey of wholesale trade for 1935. Gross margin is taken to mean the difference between net sales and cost of goods sold. Cost of goods sold is derived in the usual way by adjusting the amount of purchases during the year for differences between the year-end inventory values. Gross margin represents the amount available to cover all operating expenses and to provide a profit on the year's operations. In the case of firms operating at a loss, gross margin is less than the operating costs.

Gross margin for wholesalers proper dealing in a general line of groceries averaged 8.8 per cent of net sales in 1935 and ranged by regions from 7.8 per cent in Western Canada to 10.4 per cent in the Maritimes. Quebec and Ontario ratios were about equal at 9.2 per cent and 9.1 per cent respectively. While these gross margin figures for 1935 are not comparable with the operating expense figures for 1930 on account of the differences in the periods covered, both sets of figures reveal the same tendency to increase from East to West, reflecting differences in scale and method of operations of wholesale grocers in various parts of the country.

Gross margin, like operating expenses, decreases in proportion to annual sales as the size of business increases. In comparison with an average figure of 8.8 per cent for the entire group of wholesalers, the ratio was 14.4 per cent for firms with less than \$100,000 sales and it was 11.5 per cent for firms in the one hundred to two hundred thousand dollar class. With still greater sales further reductions in gross margin percentages are recorded, 9.4 per cent for firms whose sales ranged between three and four hundreds of thousands, 9.3 per cent between four and five, 8.8 per cent between half a million and a million, and 8.5 per cent for firms of over a million dollar sales. These results are shown in Table 18.

Comparative Figures for 1923 and 1935.--Data covering cost of goods purchased in 1923 were secured for the partial trade survey made for that year. Unfortunately, complete data on year-end inventories are lacking so that no correction can be made to the cost of goods purchased to allow for differences in the two stock values. But there is good reason to believe that inventory values at the beginning and end of 1923 would not differ greatly. Wholesale prices changed but little; the Bureau's Wholesale Price Index for foods, beverages and tobacco stood at 90.2 for 1922, 91.2 for 1923 and 90.4 for 1934. Value of food products manufactured also remained comparatively constant. Cost of goods sold by wholesale grocers during 1923 probably approximated quite closely the value of purchases during the year.

On assuming equal year-end inventories, gross margin works out at 11.3 per cent for 1923 compared with 8.8 per cent for 1930 and was fairly constant at 10.7 per cent or 10.8 per cent for all sections of the country excepting only Quebec, where a 13.2 per cent margin was reported. Lower gross margin in 1930 as compared with the earlier year may be attributed at least partially to the more extensive standardization of many commodities and to the increase in packaged and branded goods which are more easily sold. Reduction of services through the introduction of cash-and-carry wholesalers would also permit of operation on a smaller margin ratio. Increased competition by chain stores was, no doubt, a large factor in lowering gross profits of wholesale merchants.

STATISTICS FOR WHOLESALERS SERVICING VOLUNTARY CHAINS

While wide variations are found in the forms of organization for different voluntary chains, the primary purpose of their existence is the same: to establish more intimate contact between wholesaler and retail merchant. In some instances, the retail merchants have taken the initiative in the formation of the group while in other cases the wholesaler has taken the lead.

The number of grocery wholesalers associated with voluntary chains increased substantially between 1930 and 1935, partly on account of the rapid development in voluntary chains in the Maritime Provinces after the census year and partly due to an increase in the number of wholesalers affiliated with one or two large groups.

In 1930 there were 21 wholesale grocers with \$76,641,992 annual sales associated with voluntary chains whose members totalled 4,180. In 1935 there were 35 wholesalers with \$80,495,438 sales and the number of retail members was 6,121. But the

various wholesalers do not generally confine their activities to servicing these buying groups; the proportion of total sales made to members of the voluntary chains varied widely for different companies. In 1930 approximately 28 per cent of sales of affiliated wholesalers was with group members; in 1935 the corresponding ratio was 32 per cent. Figures relating to wholesalers associated with voluntary chains are given in Table 21.

Gross margin percentage of net sales for 1935 was somewhat lower for this type than for the wholesale grocer not thus connected. The ratio for wholesalers affiliated with voluntary chains was 8.2 per cent compared with 8.8 per cent for all wholesale grocers or 8.5 per cent for those firms with \$1,000,000 sales or more.

COMMODITY SALES

Schedules used in the Census of Merchandising, 1930, provided for reporting sales, first, in total, secondly, by broad commodity classes and, finally, by selected commodity items. Individual firms varied in the amount of commodity information which they could furnish. Some gave totals only while others gave figures for commodity groups but not for each selected item. About 78 per cent of the total groceries and food specialties trade for 1930 was analyzed on a commodity basis, either in part or in whole. This percentage varied for different types of establishment. In the "Wholesalers Proper" group commodity sales were reported for all exporters, for 91.6 per cent of the business done by importers and for 73.3 per cent of total sales for all other types including regular wholesale merchants. The sales coverage was less complete for some types of "Other Wholesalers", being only 48.5 per cent for agents and brokers. The following table shows total sales for the various groups of wholesalers in the groceries and food specialties trade together with the amounts which can be broken down by commodity classes either in part or in the greater detail.

Commodity Coverage by Type of Establishment for Grocery and Food Specialty Establishments, 1930

Type of Establishment	Total Net Sales, 1930 \$	Sales Analyzed by Commodities	
		Amount \$	% of total
TOTAL	465,629,200	365,640,900	78.53
Wholesalers Proper --			
Exporters	4,251,800	4,251,800	100.00
Importers	14,212,600	13,021,900	91.62
Other wholesalers proper	205,373,600	150,591,600	73.33
Other Wholesalers --			
Agents and brokers	75,573,700	36,682,800	48.54
Manufacturers' sales branches ..	72,171,700	70,701,100	97.96
All others	94,045,800	90,391,700	96.11

Commodities Sold in Groceries and Food Specialties Trade.--The commodity breakdown furnished forms a basis for estimating total sales of different items by all wholesalers. It may also be used for the purpose of showing what commodities are sold and in what proportions by wholesale establishments which specialized in the grocery trade. Groceries are not sold only by grocery wholesalers nor are grocery wholesalers restricted to the sale of grocery items. Table 22 shows what commodities were sold in the grocery trade in 1930 and the relative importance of each in respect to the whole.

The first column in the table shows the amounts of various commodities which were reported as having been sold by all types of wholesalers in the groceries and food specialties trade. But on account of the incomplete coverage of sales on a commodity basis, these figures cannot be taken to mean the total sales of the specified commodity items. For example, sales of bakery products are shown as \$11,437,200. But since commodity sales are available for only 78.53 per cent of the total wholesale grocery trade, this figure must be estimated to represent only the same proportion (i.e., 78.53 per cent) of the total sales of bakery products and must, therefore, be increased to give 100 per cent.

Under the main heading "Bakery Products" appear figures for two more detailed commodity groups: "biscuits and crackers" (\$9,100,200) and "other bakery products" (\$1,304,700). But a number of firms with sales of bakery products amounting to \$1,032,300 were unable to give the more detailed breakdown. This amount of \$1,032,300 is shown opposite the item "bakery products, not specified". It is evident, therefore, that the derivation of total sales for any detailed item must include allowances not only for the incomplete coverage of sales in its broader aspect but also for the non-itemized sales within that item's major group. First, the non-itemized figure within each group must be distributed over the other items in proportion to their sales. Resulting figures for individual items must be further increased to allow for the incomplete coverage of sales.

The columns to the right show the percentage which each item constitutes of the total sales, first, for all wholesalers in the groceries and food specialties trade and, then, for selected types. Here the total sales reported by commodity classes represent 100 so that the percentages shown for the major commodity groups are complete as they stand. Thus, sales of bakery products are seen to form 3.13 per cent of the total business of all wholesalers in the groceries and food specialties trade; canned goods account for 12.25 per cent; fruits and vegetables, 3.34 per cent, and a general grocery group comprising tea, flour, sugar, rice, etc., account for 57.00 per cent. The percentages shown for individual items must, however, be adjusted to allow for the non-itemized figure in each major group.

Table 22 shows that sales of exporters were comprised chiefly of canned goods (55.54 per cent) and a general line of groceries (28.27 per cent). Importers, on the other hand, dealt mainly in general groceries (81.16 per cent), of which tea and coffee were the major items. The business of agents and brokers also consisted largely of general groceries (61.63 per cent) with sugar occupying a prominent place. The table also tells the relative sales importance of lines of merchandise carried by general line wholesalers. More than half the business of such firms is in general groceries (51.69 per cent) with sugar, cereal preparations and flour forming the chief constituents. Canned goods form an important item at 12.92 per cent, while non-food products, chiefly tobaccos and soaps, accounted for 20.72 per cent.

Total Commodity Sales.---The preceding section contained a description of the general commodity structure of wholesale establishments in the groceries and food specialties trade and showed what commodities were sold and the relative sales importance of each. It remains to discuss the total sale of grocery commodities irrespective of the kind of wholesale establishment in which such sales were made. The commodities whose sales are discussed are those sold primarily though not solely by the groceries and food specialties trade and include: (1) Bakery products (such as cakes, biscuits, crackers); (2) Canned goods (fruits, vegetables, fish and meats, etc.); (3) Groceries (including cereal preparations, flour, rice; coffee, tea, cocoa, chocolate; extracts and spices; lard, lard substitutes and cooking fats; pickles, preserves, jellies, jams, sauces and vinegar; sugar, molasses and syrups, etc.), and (4) Food products not elsewhere specified, such as candied peel, cherries, cocoanut, fruit pectin, honey, malt, maple products, etc.

Sales of bakery products through all types of wholesale establishments (including an estimated amount to allow for incomplete commodity coverage) totalled \$17,389,000 for 1930 and of this amount 22.19 per cent was sold by wholesalers proper and the remainder by other wholesalers. Wholesalers in the groceries and food specialties trade accounted for 81.92 per cent of this annual turnover.

Canned goods were sold by all types of wholesalers to the extent of \$59,049,000 and, of this amount, wholesalers proper accounted for 50.75 per cent and other wholesalers for 49.25 per cent. These products were sold almost exclusively by wholesalers in the groceries and food specialties trade who accounted for 96.79 per cent of the total.

Sales of grocery products - as defined above - totalled \$286,794,000 for all types of wholesalers and were divided in the ratio 47.60 per cent "wholesalers proper" and 52.40 per cent "other wholesalers". The groceries and food specialties trade accounted for 92.51 per cent of the total while small amounts were sold by the farm products (not elsewhere specified) trade and the food products (not elsewhere specified) trade.

Food products (n.e.s.) were sold to the value of \$4,864,000 by wholesalers proper and \$3,550,000 by other wholesalers, making a total of \$8,414,000 for both types. The groceries and food specialties trade accounted for 83.26 per cent of the total amount.

Aggregate sales for the four commodity groups totalled \$371,646,000, of which amount 47.14 per cent was sold by wholesalers proper and 52.86 per cent by other wholesalers. In view of the incomplete coverage of sales on a commodity basis, the above figures cannot be considered to be as accurate as the other data on the operations of the wholesale trade. It must also be remembered that, due to the duplication in the wholesale trade between one type of wholesale establishment and another, these commodity sales do not represent the value of these products purchased by retailers from the wholesale firms.

III

RETAIL DISTRIBUTION OF GROCERY PRODUCTS

Summary.--Grocery products are retailed to the general public through department stores, country general stores, confectionery stores and through a number of other types of retail outlets in addition to that generally recognized as a typical grocery store. Nor are grocery stores restricted to the sale of grocery products. Soaps, household supplies, tobacco and a number of other items are carried. It is clear, therefore, that sales of grocery stores are not synonymous with the total sale of grocery products. This final section of the report gives, first, a short summary of operating results for grocery stores and then discusses the total retail sale of groceries through all types of outlets.

Results of the complete Census of Merchandising for 1930 show that there were 18,166 straight grocery units in Canada with \$243,699,300 sales that year. There were also 5,162 combination stores (selling both groceries and fresh meats) with \$161,704,100 sales and 5,379 meat or fish markets with \$83,026,200 sales. Reflecting the decline in food prices, dollar sales fell off during the depression years, combined figures for grocery and combination stores decreasing 27 per cent between 1930 and 1933. Part of the ground has been recovered although sales for 1935 were still 23 per cent below the 1930 level. Preliminary compilations for 1936 reveal further improvement of 3 per cent for grocery stores and 5 per cent for the combination type as compared with the preceding year.

Chain Stores.—The most important development in the retail distributive system in recent years is the expansion of the chain store. The Census of Merchandising and Service Establishments defines a chain as a group of four or more stores under the same ownership or management and carrying on the same or similar kinds of business. While complete statistics for years prior to 1930 are not available, estimates based upon the trade survey for 1923 show 45 food chains in Canada that year with 794 unit stores and \$37,079,600 sales. In 1930 there were 87 food chains with 2,352 stores and \$127,582,500 sales, an amount which formed 26.1 per cent of all similar stores that year including both chains and independents. The proportion of the total sales secured by chains increased somewhat to 29.0 per cent for 1931 after which there has been but little change. Figures for 1935 show 86 chain companies with 2,309 stores whose sales were \$105,635,900 or 28.5 per cent of the total for all stores in this field. Details covering food chain sales from 1930 to 1935, both for the Dominion as a whole and for the several provinces, are given in Table 23.

Voluntary Chains.—Reference to voluntary chains affiliated with one or more wholesale firms has already been made. But in addition a number of buying groups exist, each comprising a number of affiliated retailers who pool their orders for merchandise in order to secure the price advantages accruing to large-scale merchandising. These groups are not connected especially with any one wholesaler. In addition, they may function only intermittently rendering their complete enumeration difficult.

Results of the complete Census of Merchandising for 1930 show that there were 2,079 grocery stores in Canada affiliated with some type of voluntary chain that year and that these did 16.9 per cent of the annual business of all such stores. Voluntary chains occupied a similar position in the combination store field where they accounted for 16.5 per cent of the total trade. Country general stores are frequently associated with voluntary chains in so far as the purchase of grocery items is concerned. Results for 1930 show 1,596 country general stores thus connected and that these transacted more than 18 per cent of the sales for this kind-of-business group.

Data relating to the total business of voluntary chains in more recent years are lacking, but figures furnished by the affiliated wholesale houses or by secretaries of the more loosely organized types are available which show the trend both in the number of members and in the value of purchases on a co-operative basis at wholesale prices. There were 23 different voluntary chains in the food retailing field in 1930 comprising 4,472 individual members whose group purchases totalled \$22,720,502 or an average of \$5,081 each. In 1935 there were 29 voluntary chains reported with 6,465 members and \$27,525,349 purchases or an average of \$4,258 each. Details for the period 1930 to 1935 are given in Table 24.

Operating Expenses.—Operating expenses in the retail field are available for 1930 and include an estimated value for proprietors' services in addition to salaries and wages of employees, rent, delivery costs and miscellaneous expense items. Operating expenses for all grocery stores averaged 16.6 per cent of sales. They were highest for single independent stores at 19.1 per cent, lowest for chain stores at 13.6 per cent, while voluntary chains occupied an intermediate position at 15.6 per cent. Corresponding ratios for combination stores are 18.4 per cent for independents, 18.3 per cent for chains, 16.8 per cent for voluntary chains and 18.1 per cent for the group as a whole. Operating expenses for grocery and combination stores are given in Table 25.

Gross Margin.—Grocery stores operated on an average gross margin of 16.8 per cent of sales in 1935 and combination stores on 17.9 per cent according to information secured for the annual survey of retail trade for that year. Of course, not all commodities sold in food stores require the same mark-up in order to make their merchandising profitable. Some commodities are more durable than others; turnover rates vary

widely: some articles are staples while others come in the luxury or semi-luxury classes. Gross margin for each commodity must be determined on these and other bases.

In the case of chain companies, the difference between cost of goods sold and value of sales represents the gross margin for the organization as a whole. This gross margin covers not only the retailing function but wholesaling also in so far as the retail units are supplied from a central warehouse. Not all chains do maintain a central warehouse. In particular, one or two large chain companies are affiliated with a separately incorporated wholesale house from which the stores are stocked. Gross margin for grocery chains averaged 16.0 per cent of sales in 1935 while the corresponding ratio for combination store chains was 20.0 per cent.

Commodity Sales.--The schedules used for the Census of Merchandising provided for the reporting of sales by commodity classes by all stores whose annual sales for 1930 were \$25,000 or over. The analysis of sales for those stores supplying detailed information was used as a basis for computing commodity data for smaller firms not having these records. In this way, total commodity sales for all retail establishments have been estimated for 1930.

Total sales at retail of all food products totalled \$831,901,000 for 1930 according to these calculations. About one-quarter of this amount may be attributed to grocery stores and another fifth to combination stores. About two-thirds of all food sales were made by stores specializing in food products (grocery, combination stores, meat markets, fruit stores, confectionery stores, etc.). Country general stores are also important in the food retailing field, more than 13 per cent of all retail sales of food products being made through this type of store. Department stores come next in importance with about 5 per cent of the total food business. Table 26 presents figures to show the value of food products sold in 1930 through different kinds of retail stores, first, for the total food trade as a whole and then for some of the more important food commodities.

Table 1.--Distribution of Sales of Manufacturers in the Food Industries Group, Canada, 1930

Industry	Value of Production, 1930 \$	Per Cent of Total Sales Made to -						
		Manufac- turers' wholesale branches	Other whole- salers	Manufac- turers' retail branches	Other (1) retailers	Industrial and other large consumers	Household consumers	Export sales
Total - All Food Industries	747,398,498	12.7	26.4	1.7	29.8	7.5	12.4	9.5
Total - Food Industries, Less Meat Products	580,982,505	5.9	32.7	1.2	24.2	9.2	15.9	10.9
Biscuits, confectionery, cocoa, etc. ...	58,059,602	22.4	26.7	6.1	40.9	1.2	1.3	1.4
Bread and other bakery products	73,594,894	-	-	-	29.9(2)	-	70.1	-
Coffee, tea and spices	24,378,447	16.0	14.8	8.1	53.6	6.5	0.1	0.9
Flour and feed mills	144,855,946	6.6	25.5	1.5	15.7	18.7(3)	5.3(4)	26.7
Foods, breakfast	6,599,442	4.5	43.4	-	14.4	-	1.0	36.7
Foods, miscellaneous	7,060,159	20.7	51.4	-	11.1	16.6	0.1	0.1
Foods, stock and poultry	3,071,918	3.4	12.1	1.5	66.1	-	16.4(4)	0.5
Fruit and vegetable preparations	31,453,415	0.4	63.0	0.3	31.5	2.5	0.1	2.2
Ice cream cones	487,351	-	97.1	-	2.4	-	0.3	0.2
Macaroni, vermicelli, etc.	1,246,147	-	86.4	-	11.5	-	0.2	1.9
Maple syrup and sugar	1,355,270	-	26.9	-	14.5	9.3	0.1	49.2
Malt and malt products	4,817,553	11.5	-	-	-	81.7	-	6.8
Pickles, vinegar and sauces	11,635,337	41.8	14.9	-	17.6	1.0	0.2	24.5
Rice mills	1,367,101	-	85.5	-	13.7	-	0.3	0.5
Sugar refineries	42,935,722	-	79.4	-	6.9	12.0	-	1.7
Miscellaneous vegetable industries	4,792,963	-	31.1	-	4.5	61.9	-	2.5
Animal oils and fats	430,375	-	13.7	-	0.3	84.5	0.9	0.6
Butter and cheese	113,018,789	-	42.2	-	26.3(5)	4.4	26.9(6)	0.2
Condensed milk	13,604,743	-	26.2	-	28.3	27.1(6)	-	18.4
Fish curing and packing	32,973,308	0.7	41.3	-	15.5(5)	0.8	0.3	41.4
Sausage and sausage casings	2,386,040	1.3	6.2	4.9	82.4	-	3.0	2.2
Slaughtering and meat packing	164,029,953	36.0	4.4	3.6	48.8	1.4	0.4	4.8
Salt	1,694,631	-	55.7	-	21.9	22.0	-	0.4
Flavouring extracts	1,544,092	13.5	36.7	-	31.4	18.1	-	0.3

(1) Includes department and chain stores.

(2) Includes sales to hotels and other large users.

(3) Consists chiefly of sales to bakeries.

(4) Includes sales to farmers.

(5) Includes sales to retail branches.

(6) Includes sales of fluid milk and cream by dairy factories.

Table 2.--Wholesale Groceries and Food Specialties Trade, by Kinds of Business, Canada, 1930

Kind of Business	Number of Es- tablish- ments	Number of Proprie- tors	Number of Employees		Salaries and Wages	Net Sales	Stocks on Hand, End of Year (at cost)
			Male	Female			
					\$	\$	\$
Groceries and Food Specialties, Total	967	504	9,098	2,156	17,020,800	465,629,200	43,236,400
Groceries (general line)	504	316	6,291	1,505	11,257,100	323,931,000	28,663,400
Food and grocery specialties	463	188	2,807	651	5,763,700	141,698,200	14,573,000
Bakery products	14	14	25	6	32,900	198,700	6,500
Biscuits and crackers	42	4	412	56	897,500	8,538,200	335,200
Canned fruits and vegetables	2	(X)	(X)	(X)	(X)	(X)	(X)
Canned goods (general line)	28	15	241	36	553,700	12,252,300	717,300
Canned sea food	14	7	84	22	251,500	10,125,100	3,899,600
Cereals	2	(X)	(X)	(X)	(X)	(X)	(X)
Coffee, tea, spices and cocoa	74	50	354	134	812,100	16,055,400	1,457,500
Extracts and spices	7	1	28	4	77,700	450,500	65,100
Flour	26	10	290	53	598,100	18,000,900	1,922,400
Flour and feed	87	41	667	71	1,104,600	39,178,900	2,024,400
Fruits and vegetables (dried)	4	4	9	6	26,100	859,900	22,000
Sugar	14	5	23	20	82,500	18,016,700	1,987,600
Other food and grocery specialties ..	149	36	658	240	1,294,300	16,270,200	1,998,000

An (X) indicates that figures are withheld to avoid disclosing individual operations.

Table 3.—Wholesale Groceries and Food Specialties Trade, by Provinces and by Kinds of Business, 1930

Province	TOTAL				Groceries (General Line)				Groceries (Specialty Lines)				Per cent of Total Popula- tion
	Establish- ments		Sales		Establish- ments		Sales		Establish- ments		Sales		
	No.	%	Amount	%	No.	%	Amount	%	No.	%	Amount	%	
			\$				\$				\$		
CANADA	967	100.00	465,623,200	100.00	504	100.00	323,931,000	100.00	463	100.00	141,698,200	100.00	100.0
Prince Edward Island	8	0.83	2,695,400	0.58	5	0.99	2,607,800	0.80	3	0.65	87,600	0.06	0.9
Nova Scotia	80	8.27	19,094,400	4.10	49	9.72	15,305,000	4.72	31	6.70	3,789,400	2.67	4.9
New Brunswick ..	64	6.62	18,684,100	4.01	42	8.33	12,204,200	3.77	22	4.75	6,479,900	4.57	3.9
Quebec	216	22.34	122,046,100	26.21	116	23.02	74,051,200	22.86	100	21.60	47,994,900	33.87	27.7
Ontario	327	33.82	163,255,200	35.06	144	28.57	111,740,600	34.50	183	39.52	51,514,600	36.36	33.1
Manitoba	60	6.20	38,462,200	8.26	32	6.35	27,695,200	8.55	28	6.05	10,767,000	7.60	6.7
Saskatchewan ...	51	5.27	27,379,800	5.88	39	7.74	26,750,300	8.26	12	2.59	629,500	0.45	8.9
Alberta	64	6.62	33,111,700	7.11	36	7.14	28,137,600	8.69	28	6.05	4,974,100	3.51	7.1
British Columbia	97	10.03	40,900,300	8.79	41	8.14	25,439,100	7.85	56	12.09	15,461,200	10.91	6.7

Table 4.--Wholesale Groceries and Food Specialties Trade - Wholesalers Proper, by Kinds of Business,
Canada, 1930

Kind of Business	Number of Es- tablish- ments	Number of Proprie- tors	Number of Employees		Salaries and Wages	Net Sales	Stocks on Hand, End of Year (at cost)
			Male	Female			
Groceries and Food Specialties, Total.	562	355	5,968	1,287	10,461,600	223,838,000	26,560,100
Groceries (general line)	361	233	5,146	1,043	8,853,400	197,878,400	24,177,200
Food and grocery specialties	201	122	822	244	1,608,200	25,959,600	2,382,900
Bakery products	13	14	22	6	27,600	182,500	6,100
Biscuits and crackers	2	(X)	(X)	(X)	(X)	(X)	(X)
Canned goods (general line)	4	1	16	1	38,400	1,089,500	133,200
Canned sea food	3	-	15	1	32,500	753,600	30,600
Cereals	1	(X)	(X)	(X)	(X)	(X)	(X)
Coffee, tea, spices and cocoa	46	37	172	56	384,900	7,295,900	706,500
Extracts and spices	1	(X)	(X)	(X)	(X)	(X)	(X)
Flour	7	7	11	3	15,500	922,900	10,900
Flour and feed	29	29	113	18	160,000	4,825,800	261,000
Fruits and vegetables (dried)	2	(X)	(X)	(X)	(X)	(X)	(X)
Sugar	1	(X)	(X)	(X)	(X)	(X)	(X)
Other food and grocery specialties ...	92	26	461	155	931,700	10,596,000	1,198,500

An (X) indicates that figures are withheld to avoid disclosing individual operations.

Table 5.—Wholesale Groceries and Food Specialties Trade,
by Type of Establishment, Canada, 1930

Type of Establishment	Establishments		Sales	
	Number	%	Amount \$	%
Total	967	100.00	465,629,200	100.00
Wholesalers proper	562	58.12	223,838,000	48.07
Wholesale merchants	484	50.05	204,928,200	44.01
Other wholesalers proper	78	8.07	18,909,800	4.06
Other wholesalers	405	41.88	241,791,200	51.93
District and general sales offices	8	0.83	24,414,500	5.24
Manufacturers' sales branches ..	183	18.93	72,171,700	15.50
Chain store warehouses	24	2.48	67,893,700	14.58
Agents and brokers	180	18.61	75,573,700	16.23
Brokers	63	6.51	25,921,000	5.56
Commission merchants	20	2.07	11,151,300	2.39
Export agents	7	0.72	2,894,400	0.62
Import agents	22	2.28	6,494,800	1.39
Manufacturers' agents	67	6.93	29,095,300	6.25
Other agents	1	0.10	16,900	(a)
All other	10	1.03	1,737,600	0.37

(a) Less than 0.01 per cent.

Table 6.—Wholesale Groceries and Food Specialties Trade, by Type of Establishment
and Kind of Business, Canada, 1930

Type of Establishment	TOTAL				Groceries (General Line)				Groceries (Specialty Lines)			
	Establish- ments		Sales		Establish- ments		Sales		Establish- ments		Sales	
	No.	%	Amount	%	No.	%	Amount	%	No.	%	Amount	%
			\$				\$				\$	
Total	967	100.00	465,629,200	100.00	504	100.00	323,931,000	100.00	463	100.00	141,698,200	100.00
Wholesalers proper	562	58.12	223,838,000	48.07	361	71.63	197,878,400	61.09	201	43.41	25,959,600	18.32
Wholesale merchants.	484	50.05	204,928,200	44.01	-	-	-	-	-	-	-	-
Other wholesalers proper	78	8.07	18,909,800	4.06	-	-	-	-	-	-	-	-
Other wholesalers	405	41.88	241,791,200	51.93	143	28.37	126,052,600	38.91	262	56.59	115,738,600	81.68
Manufacturers' sales branches	183	18.93	72,171,700	15.50	-	-	-	-	-	-	-	-
Chain store ware- houses	24	2.48	67,893,700	14.58	-	-	-	-	-	-	-	-
Agents and brokers .	180	18.61	75,573,700	16.23	-	-	-	-	-	-	-	-
All other	18	1.86	26,152,100	5.62	-	-	-	-	-	-	-	-

Table 7.--Wholesale Groceries and Food Specialties Trade, by Provinces
and by Type of Establishment, 1930

Province	TOTAL				Wholesalers Proper				Other Wholesalers				Per cent of Total Popula- tion
	Establish- ments		Sales		Establish- ments		Sales		Establish- ments		Sales		
	No.	%	Amount	%	No.	%	Amount	%	No.	%	Amount	%	
			\$				\$				\$		
CANADA, Total.	967	100.00	465,629,200	100.00	562	100.00	223,838,000	100.00	405	100.00	241,791,200	100.00	100.0
Prince Edward Island	8	0.83	2,695,400	0.58	7	1.25	2,637,700	1.18	1	0.25	57,700	0.02	0.9
Nova Scotia	80	8.27	19,094,400	4.10	60	10.68	14,039,000	6.27	20	4.94	5,055,400	2.10	4.9
New Brunswick ...	64	6.62	18,684,100	4.01	42	7.47	10,605,000	4.74	22	5.43	8,079,100	3.34	3.9
Quebec	216	22.34	122,046,100	26.21	138	24.55	49,991,300	22.33	78	19.26	72,054,800	29.80	27.7
Ontario	327	33.82	163,255,200	35.06	187	33.27	65,110,600	29.09	140	34.57	98,144,600	40.59	33.1
Manitoba	60	6.20	38,462,200	8.26	24	4.27	18,095,200	8.09	36	8.89	20,367,000	8.42	6.7
Saskatchewan	51	5.27	27,379,800	5.88	28	4.98	19,100,700	8.53	23	5.68	8,279,100	3.43	8.9
Alberta	64	6.62	33,111,700	7.11	26	4.63	19,203,200	8.58	38	9.38	13,908,500	5.75	7.1
British Columbia.	97	10.03	40,900,300	8.79	50	8.90	25,055,300	11.19	47	11.60	15,845,000	6.55	6.7

Table 8.--Wholesale Groceries and Food Specialties Trade, Classified According to Amount of Annual Sales,
by Economic Divisions, 1930
(Sales shown in thousands of dollars)

Size of Business	TOTAL				General Line				Food Specialties			
	Establish-ments		Sales		Establish-ments		Sales		Establish-ments		Sales	
	No.	%	Amount	%	No.	%	Amount	%	No.	%	Amount	%
CANADA, Total	967	100.00	465,629	100.00	504	100.00	323,931	100.00	463	100.00	141,698	100.00
Less than \$25,000	114	11.79	1,466	0.31	16	3.17	246	0.08	98	21.17	1,219	0.86
\$25,000 - \$49,999	106	10.96	3,802	0.82	26	5.16	974	0.30	80	17.29	2,828	2.00
\$50,000 - \$99,999	111	11.48	8,089	1.74	42	8.33	3,121	0.96	69	14.90	4,968	3.51
\$100,000 - \$199,999	145	15.00	21,209	4.55	73	14.48	10,704	3.30	72	15.55	10,505	7.41
\$200,000 - \$299,999	106	10.96	25,644	5.51	61	12.10	14,927	4.61	45	9.72	10,717	7.56
\$300,000 - \$399,999	78	8.07	26,854	5.77	51	10.12	17,613	5.44	27	5.83	926	6.52
\$400,000 - \$499,999	51	5.27	22,601	4.85	46	9.13	20,363	6.29	5	1.07	2,238	1.58
\$500,000 - \$999,999	144	14.89	98,757	21.21	110	21.84	77,367	23.88	34	7.34	21,390	15.10
\$1,000,000 and over	112	11.58	257,208	55.24	79	15.67	178,611	55.14	33	7.13	78,597	55.46
Maritime Provinces, Total	152	100.00	40,474	100.00	96	100.00	30,117	100.00	56	100.00	10,357	100.00
Less than \$25,000	14	9.21	176	0.43	1	1.04	9	0.03	13	23.21	167	1.61
\$25,000 - \$49,999	14	9.21	562	1.39	6	6.25	229	0.76	8	14.29	332	3.21
\$50,000 - \$99,999	21	13.82	1,612	3.98	12	12.50	919	3.05	9	16.06	694	6.70
\$100,000 - \$199,999	31	20.39	4,663	11.52	18	18.75	2,546	8.45	13	23.21	2,117	20.44
\$200,000 - \$299,999	22	14.47	5,148	12.72	17	17.71	3,892	12.92	5	8.93	1,256	12.13
\$300,000 - \$399,999	15	9.87	4,975	12.29	14	14.58	4,629	15.37	1	1.79	345	3.33
\$400,000 - \$499,999	15	9.87	6,688	16.53	14	14.58	6,226	20.67	1	1.79	461	4.45
\$500,000 - \$999,999	15	9.87	9,659	23.87	10	10.42	6,393	21.24	5	8.93	3,267	31.54
\$1,000,000 and over	5	3.29	6,991	17.27	4	4.17	5,274	17.51	1	1.79	1,718	16.59
Quebec, Total	216	100.00	122,046	100.00	116	100.00	74,051	100.00	100	100.00	47,995	100.00
Less than \$25,000	34	15.74	450	0.37	6	5.17	102	0.14	28	28.00	348	0.73
\$25,000 - \$49,999	23	10.65	791	0.65	8	6.90	264	0.36	15	15.00	527	1.10
\$50,000 - \$99,999	15	6.94	1,035	0.85	10	8.62	685	0.93	5	5.00	349	0.73
\$100,000 - \$199,999	36	16.67	5,299	4.34	21	18.10	3,124	4.22	15	15.00	2,176	4.53
\$200,000 - \$299,999	24	11.11	6,007	4.92	14	12.07	3,654	4.93	10	10.00	2,353	4.90
\$300,000 - \$399,999	19	8.80	6,497	5.32	12	10.35	4,032	5.44	7	7.00	2,465	5.14
\$400,000 - \$499,999	11	5.09	4,899	4.01	10	8.62	4,475	6.04	1	1.00	424	0.88
\$500,000 - \$999,999	28	12.96	21,151	17.33	21	18.10	16,580	22.39	7	7.00	4,571	9.52
\$1,000,000 and over	26	12.04	75,917	62.21	14	12.07	41,135	55.55	12	12.00	34,782	72.47

Table 8.—Wholesale Groceries and Food Specialties Trade, Classified According to Amount of Annual Sales,
by Economic Divisions, 1930 (Continued) -
(Sales shown in thousands of dollars)

Size of Business	TOTAL				General Line				Food Specialties			
	Establish-ments		Sales		Establish-ments		Sales		Establish-ments		Sales	
	No.	%	Amount	%	No.	%	Amount	%	No.	%	Amount	%
			\$				\$				\$	
Ontario, Total	327	100.00	163,255	100.00	144	100.00	111,741	100.00	183	100.00	51,515	100.00
Less than \$25,000	43	13.15	511	0.31	4	2.78	79	0.07	39	21.31	432	0.84
\$25,000 - \$49,999	41	12.54	1,418	0.87	7	4.86	287	0.26	34	18.58	1,132	2.20
\$50,000 - \$99,999	35	10.70	2,585	1.58	7	4.86	545	0.49	28	15.30	2,040	3.96
\$100,000 - \$199,999	42	12.84	6,150	3.77	19	13.19	2,884	2.58	23	12.57	3,266	6.34
\$200,000 - \$299,999	35	10.70	8,467	5.19	20	13.89	4,979	4.46	15	8.20	3,487	6.77
\$300,000 - \$399,999	33	10.09	11,629	7.12	19	13.19	6,845	6.13	14	7.65	4,783	9.28
\$400,000 - \$499,999	16	4.89	7,101	4.35	13	9.03	5,748	5.14	3	1.64	1,353	2.63
\$500,000 - \$999,999	48	14.69	32,333	19.81	34	23.62	23,381	20.92	14	7.65	8,953	17.38
\$1,000,000 and over	34	10.40	93,061	57.00	21	14.58	66,993	59.95	13	7.10	26,069	50.60
Prairie Provinces, Total	175	100.00	98,954	100.00	107	100.00	82,583	100.00	68	100.00	16,371	100.00
Less than \$25,000	13	7.43	195	0.20	3	2.80	41	0.05	10	14.71	154	0.94
\$25,000 - \$49,999	17	9.71	624	0.63	3	2.80	122	0.15	14	20.59	501	3.06
\$50,000 - \$99,999	24	13.71	1,803	1.82	9	8.41	748	0.91	15	22.05	1,055	6.44
\$100,000 - \$199,999	19	10.86	2,822	2.85	8	7.48	1,243	1.51	11	16.18	1,580	9.65
\$200,000 - \$299,999	16	9.14	3,800	3.84	6	5.61	1,464	1.78	10	14.71	2,336	14.27
\$300,000 - \$399,999	7	4.00	2,451	2.48	6	5.61	2,111	2.56	1	1.47	340	2.08
\$400,000 - \$499,999	5	2.86	2,211	2.23	5	4.67	2,211	2.68	-	-	-	-
\$500,000 - \$999,999	36	20.57	24,847	25.11	34	31.78	23,685	28.67	2	2.94	1,162	7.10
\$1,000,000 and over	38	21.72	60,201	60.84	33	30.84	50,958	61.69	5	7.35	9,243	56.46
British Columbia, Total	97	100.00	40,900	100.00	41	100.00	25,439	100.00	56	100.00	15,461	100.00
Less than \$25,000	10	10.31	133	0.33	2	4.88	15	0.06	8	14.29	117	0.76
\$25,000 - \$49,999	11	11.34	407	0.99	2	4.88	71	0.28	9	16.06	336	2.17
\$50,000 - \$99,999	16	16.49	1,055	2.58	4	9.76	225	0.88	12	21.43	830	5.37
\$100,000 - \$199,999	17	17.53	2,275	5.56	7	17.07	909	3.57	10	17.85	1,367	8.84
\$200,000 - \$299,999	9	9.28	2,222	5.43	4	9.76	938	3.69	5	8.93	1,284	8.30
\$300,000 - \$399,999	4	4.12	1,302	3.18	-	-	-	-	4	7.14	1,302	8.42
\$400,000 - \$499,999	4	4.12	1,702	4.16	4	9.76	1,702	6.69	-	-	-	-
\$500,000 - \$999,999	17	17.53	10,767	26.33	11	26.82	7,328	28.81	6	10.72	3,439	22.25
\$1,000,000 and over	9	9.28	21,037	51.44	7	17.07	14,251	56.02	2	3.58	6,786	43.89

Table 9.—Wholesale Groceries and Food Specialties Trade Classified According to
Number of Marketing Units, Canada, 1930

Number of Units	TOTAL				Wholesalers Proper				Other Wholesalers			
	Establish-ments		Sales		Establish-ments		Sales		Establish-ments		Sales	
	No.	%	Amount	%	No.	%	Amount	%	No.	%	Amount	%
			\$				\$				\$	
Total	967	100.00	465,629,000	100.00	562	100.00	223,838,000	100.00	405	100.00	241,791,000	100.00
Single unit establish-ments	519	53.67	200,860,000	43.14	356	63.34	115,945,000	51.80	163	40.25	84,915,000	35.12
2 units	60	6.20	60,574,000	13.01	31	5.52	13,490,000	6.03	29	7.16	47,084,000	19.47
3 - 5 units	108	11.17	54,361,000	11.67	44	7.83	31,871,000	14.24	64	15.80	22,490,000	9.30
6 - 25 units	196	20.27	121,099,000	26.01	47	8.36	33,797,000	15.10	149	36.79	87,302,000	36.11
Over 25 units	84	8.69	28,735,000	6.17	84	14.95	28,735,000	12.83	-	-	-	-

In some instances, multiple organizations operated individual establishments in different lines of business. The above table includes only those units classified as wholesale dealers in groceries or food specialties.

Table 10.--Sales-Territory Radius Reported by Wholesalers Proper, General Line of Groceries,
by Economic Divisions, 1930

Sales Radius	CANADA				Maritime Provinces				Quebec			
	Establish-ments		Sales		Establish-ments		Sales		Establish-ments		Sales	
	Number	%	Amount	%	Number	%	Amount	%	Number	%	Amount	%
			\$				\$				\$	
Totals	361	-	197,878,400	-	81	-	24,482,100	-	91	-	43,266,900	-
Not Reported	83	-	30,852,300	-	20	-	4,309,900	-	27	-	9,216,000	-
Total Reported ..	278	100.0	167,026,100	100.0	61	100.0	20,172,200	100.0	64	100.0	34,050,900	100.0
City and local	23	8.3	4,972,100	3.0	5	8.2	693,300	3.4	8	12.5	1,824,500	5.4
25 miles	58	20.9	29,295,100	17.5	9	14.8	2,385,200	11.8	7	10.9	2,865,700	8.4
75 miles	78	28.0	30,521,200	18.3	19	31.1	4,537,500	22.5	25	39.1	7,774,100	22.8
Part of province	56	20.1	46,002,800	27.5	15	24.6	6,156,600	30.5	7	10.9	6,256,500	18.4
Whole province	26	9.4	19,961,800	11.9	7	11.5	2,814,200	14.0	4	6.3	1,273,900	3.7
Two provinces	16	5.8	11,146,400	6.7	3	4.9	1,861,700	9.2	6	9.4	4,179,200	12.3
Region	11	3.9	20,503,800	12.3	3	4.9	1,725,700	8.6	3	4.7	8,972,500	26.3
Dominion	8)											
Canada and foreign	2)	3.6	4,622,900	2.8	-	-	-	-	4	6.2	904,500	2.7

Sales Radius	Ontario				Prairie Provinces				British Columbia			
			\$				\$				\$	
Totals	98	-	52,953,900	-	62	-	55,081,800	-	29	-	22,093,700	-
Not Reported	15	-	4,173,700	-	13	-	9,786,200	-	8	-	3,366,500	-
Total Reported ..	83	100.0	48,780,200	100.0	49	100.0	45,295,600	100.0	21	100.0	18,727,200	100.0
City and local	8	9.6	1,806,200	3.7	-	-	-	-	2	9.5	648,100	3.5
25 miles	40	48.2	23,538,300	48.2	2	4.1	507,900	1.1	-	-	-	-
75 miles	17	20.5	7,302,800	15.0	12	24.5	8,110,100	17.9	5	23.8	2,796,700	14.9
Part of province	7	8.5	4,982,200	10.2	22	44.8	21,190,300	46.8	5	23.8	7,417,200	39.6
Whole province	8	9.6	10,439,700	21.4	4	8.2	4,486,400	9.9	3	14.3	947,600	5.1
Two provinces	1	1.2	179,600	0.4	5	10.2	4,731,400	10.5	1	4.8	194,500	1.0
Region	-	-	-	-	4	8.2	6,269,500	13.8	1	4.8	3,536,100	18.9
Dominion												
Canada and foreign	2	2.4	531,400	1.1	-	-	-	-	4	19.0	3,187,000	17.0

Table 11.--Operating Expense Analysis for Wholesale Groceries and Food Specialties Trade,
by Type of Establishment, Type of Operation and Kind of Business, Canada, 1930

	(a) Wholesale Merchants, General Line						(b) Wholesale Merchants, Specialty Lines	
	TOTAL		Independents		Multiples		TOTAL	
	Number or Amount	%	Number or Amount	%	Number or Amount	%	Number or Amount	%
Number of establishments	293		171		122		123	
Net sales	\$168,229,800	100.00	\$78,590,800	100.00	\$89,639,000	100.00	\$13,945,800	100.00
Total expenses	\$ 14,144,300	8.41	\$ 6,517,100	8.29	\$ 7,627,200	8.51	\$ 2,050,600	14.70
Salaries and wages, total	\$ 7,660,100	4.55	\$ 3,554,000	4.52	\$ 4,106,100	4.58	\$ 1,118,300	8.02
Salesmen	\$ 1,948,500	1.16	\$ 969,300	1.23	\$ 979,200	1.09	\$ 341,600	2.45
Executives	\$ 1,258,200	0.75	\$ 486,800	0.62	\$ 771,400	0.86	\$ 137,500	0.99
Others	\$ 4,453,400	2.65	\$ 2,097,900	2.67	\$ 2,355,500	2.63	\$ 639,200	4.58
Other expenses, total	\$ 6,484,200	3.85	\$ 2,963,100	3.77	\$ 3,521,100	3.93	\$ 932,300	6.69
Selling	\$ 958,500	0.57	\$ 432,000	0.55	\$ 526,500	0.59	\$ 81,700	0.59
Interest	\$ 727,900	0.43	\$ 338,800	0.43	\$ 389,100	0.43	\$ 38,000	0.27
Other expenses, including rent	\$ 4,797,800	2.85	\$ 2,192,300	2.79	\$ 2,605,500	2.91	\$ 812,600	5.83
Average stocks on hand, 1930 (1) ..	\$ 22,037,000	13.10	\$10,199,300	12.98	\$11,837,700	13.21	\$ 1,302,000	9.34
Sales in rented premises	\$ 86,387,000	100.00	\$37,349,300	100.00	\$49,037,700	100.00	\$10,809,400	100.00
Rentals paid	\$ 396,400	0.46	\$ 184,000	0.49	\$ 212,400	0.43	\$ 81,100	0.75

(1) Average of stocks at beginning and end of year.

Note: This table includes data for only those establishments for which complete breakdown of employees, salaries and wages, and expenses were given.

Table 11. -- Operating Expense Analysis for Wholesale Groceries and Food Specialties
Trade, by Type of Establishment, Type of Operation and Kind of Business,
Canada, 1930 (Continued) --

	TOTAL		Independents		Multiples	
	Number or Amount	%	Number or Amount	%	Number or Amount	%
(c) Agents and Brokers - General Lines and Specialties						
Number of establishments .	154		117		37	
Net sales	\$58,057,700	100.00	\$38,274,300	100.00	\$19,783,400	100.00
Total expenses	\$ 1,689,800	2.91	\$ 1,032,200	2.70	\$ 657,600	3.32
Salaries and wages, total	\$ 928,200	1.60	\$ 510,000	1.33	\$ 418,200	2.11
Salesmen	\$ 422,600	0.73	\$ 232,300	0.61	\$ 190,300	0.96
Executives	\$ 121,700	0.21	\$ 92,700	0.24	\$ 29,000	0.15
Others	\$ 383,900	0.66	\$ 185,000	0.48	\$ 198,900	1.00
Other expenses, total ..	\$ 761,600	1.31	\$ 522,200	1.37	\$ 239,400	1.21
Selling	\$ 135,900	0.23	\$ 89,400	0.23	\$ 46,500	0.23
Interest	\$ 36,200	0.06	\$ 22,900	0.07	\$ 13,300	0.07
Other expenses, in- cluding rent	\$ 589,500	1.02	\$ 409,900	1.07	\$ 179,600	0.91
Average stocks on hand, 1930 (1)	\$ 986,900	1.70	\$ 573,100	1.50	\$ 413,800	2.09
Sales in rented premises .	\$59,657,500	100.00	\$37,612,500	100.00	\$22,045,000	100.00
Rentals paid	\$ 127,600	0.21	\$ 70,100	0.19	\$ 57,500	0.26

(d) Chain Store Warehouses - General Line of Groceries

	TOTAL		Independents		Multiples	
	Number or Amount	%	Number or Amount	%	Number or Amount	%
Number of establishments .	21		13		8	
Net sales	\$64,396,200	100.00	\$26,841,800	100.00	\$37,554,400	100.00
Total expenses	\$ 2,279,100	3.54	\$ 1,272,100	4.74	\$ 1,007,000	2.68
Salaries and wages, total	\$ 1,386,400	2.15	\$ 681,400	2.54	\$ 705,000	1.88
Salesmen	-	-	-	-	-	-
Executives	\$ 430,300	0.67	\$ 218,400	0.81	\$ 211,900	0.57
Others	\$ 956,100	1.48	\$ 463,000	1.73	\$ 493,100	1.31
Other expenses, total ..	\$ 892,700	1.39	\$ 590,700	2.20	\$ 302,000	0.80
Selling	-	-	-	-	-	-
Interest	\$ 1,300	(a)	\$ 1,300	(a)	-	-
Other expenses, in- cluding rent	\$ 891,400	1.38	\$ 589,400	2.20	\$ 302,000	0.80
Stocks on hand, 1930 (2) ..	\$ 3,488,000	5.42	\$ 2,024,800	7.54	\$ 1,463,200	3.90
Sales in rented premises .	\$26,434,000	100.00	\$ 8,306,200	100.00	\$18,127,800	100.00
Rentals paid	\$ 92,800	0.35	\$ 20,700	0.25	\$ 72,100	0.40

(1) Average of stocks at beginning and end of year.

(a) Less than 0.01 per cent.

(2) Stocks on hand at end of 1930 only.

Table 12.--Operating Expense Analysis for Single Independent Establishments
in the Wholesale Groceries and Food Specialties Trade, by Size of Business

Size of Business	Number of estab- lish- ments	(1) Net sales per cent of total	Total expenses per cent of net sales	Salesmen(2)		Stocks on hand, end of year, per cent of net sales
				No.	Average sales per salesman	Salaries & expenses, per cent of net sales

(a) Wholesale Merchants - General Line of Groceries

Total	185	100.0	8.2	519	133,278	2.0	12.4
Under \$100,000	37	2.0	11.8	22	32,359	5.2	17.0
\$100,000 - \$499,999 ...	97	29.3	8.2	184	106,730	2.2	14.1
\$500,000 - \$999,999 ...	32	25.2	8.3	140	138,236	2.1	12.2
\$1,000,000 and over ...	19	43.5	7.9	173	170,333	1.8	11.1

(1) Net sales were \$85,968,300.

(2) Average sales per salesman and salesmen's salaries and expenses as percentages of net sales are computed on the basis of only those establishments reporting the use of salesmen.

(b) Other Wholesalers Proper⁽¹⁾ - General Lines and Specialties

Total	48	(2) 100.0	9.1	65	(3) 78,585	3.4	10.2
Under \$100,000	20	6.2	22.2	17	12,918	14.4	21.8
\$100,000 - \$499,999 ...	23	57.3	10.0	38	61,683	4.5	12.2
\$500,000 - \$999,999 ...	4	24.7	5.7	8	182,988	2.0	6.4
\$1,000,000 and over ...	1	11.8	4.9	4	300,975	1.1	1.9

(1) Includes exporters, importers, cash and carry wholesalers, drop shippers, mail order wholesalers and wagon distributors.

(2) Net sales were \$10,218,500.

(3) Average sales per salesman and salesmen's salaries and expenses as percentages of net sales are computed on the basis of only those establishments reporting the use of salesmen.

(c) Agents and Brokers⁽¹⁾ - General Lines and Specialties

Total	119	(2) 100.0	2.7	123	(3) 173,962	1.5	1.5
Under \$100,000	35	4.3	9.7	17	29,359	8.0	8.2
\$100,000 - \$499,999 ...	56	34.6	2.7	53	124,753	1.7	0.9
\$500,000 - \$999,999 ...	19	30.3	2.5	27	159,089	2.0	0.6
\$1,000,000 and over ...	9	30.8	2.0	26	384,265	0.9	2.0

(1) Includes auction companies, brokers, commission merchants, export agents, import agents, manufacturers' agents, purchasing agents, resident buyers and selling agents.

(2) Net sales were \$39,591,300.

(3) Average sales per salesman and salesmen's salaries and expenses as percentages of net sales are computed on the basis of only those establishments reporting the use of salesmen.

Note: This table includes data for only those single independent firms which reported operating expenses.

Table 13.--Operating Expense Analysis for Wholesale Groceries and Food Specialties Trade,
by Economic Divisions and Type of Establishment, 1930

Economic Division	Wholesale Merchants (General line of groceries)			Wholesale Merchants (Specialty lines)			Agents and Brokers (General lines and specialties)	Manufacturers' Sales Branches (General lines and specialties)
	Total	Indepen- dents	Multiples	Total	Indepen- dents	Multiples		
CANADA --								
No. of est. ..	312	185	127	129	75	54	167	155
Net sales	\$179,140,700	\$85,968,300	\$93,172,400	\$14,284,100	\$7,295,100	\$6,989,000	\$69,698,600	\$87,568,500
Total expenses	\$ 14,857,400	\$ 7,013,200	\$ 7,844,200	\$ 2,129,000	\$ 748,000	\$1,381,000	\$ 1,901,000	\$ 9,967,700
% of sales ...	8.3	8.2	8.4	14.9	10.3	19.8	2.7	11.4
Maritimes --								
No. of est. ..	73	51	22	14	9	5	16	18
Net sales	\$ 23,519,300	\$16,012,200	\$ 7,507,100	\$ 1,011,800	(X)	(X)	\$ 6,051,500	\$ 4,385,600
Total expenses	\$ 2,281,900	\$ 1,433,400	\$ 848,500	\$ 109,200	(X)	(X)	\$ 155,500	\$ 464,200
% of sales ...	9.7	9.0	11.3	10.8	(X)	(X)	2.6	10.6
Quebec --								
No. of est. ..	90	63	27	30	22	8	29	25
Net sales	\$ 38,938,500	\$31,795,300	\$ 7,143,200	\$ 4,162,500	(X)	(X)	\$12,311,400	\$32,507,200
Total expenses	\$ 3,357,700	\$ 2,652,000	\$ 705,700	\$ 542,100	(X)	(X)	\$ 485,500	\$ 3,121,800
% of sales ...	8.6	8.3	9.9	13.0	(X)	(X)	3.9	9.6
Ontario --								
No. of est. ..	70	47	23	61	35	26	51	58
Net sales	\$ 45,471,100	\$19,566,800	\$25,904,300	\$ 6,711,900	\$2,537,200	\$4,174,700	\$19,178,300	\$50,388,100
Total expenses	\$ 3,701,600	\$ 1,562,600	\$ 2,139,000	\$ 895,100	\$ 286,400	\$ 608,700	\$ 360,200	\$ 3,546,200
% of sales ...	8.1	8.0	8.3	13.3	11.3	14.6	1.9	11.7
Prairies --								
No. of est. ..	58	14	44	15	4	11	49	35
Net sales	\$ 52,674,700	\$14,148,700	\$38,526,000	\$ 1,234,200	\$ 107,500	\$1,126,900	\$24,821,900	\$12,389,600
Total expenses	\$ 4,084,300	\$ 1,054,000	\$ 3,030,300	\$ 321,700	\$ 25,900	\$ 295,800	\$ 692,600	\$ 2,085,500
% of sales ...	7.8	7.4	7.9	26.1	24.1	26.2	2.8	16.8
British Columbia --								
No. of est. ..	21	10	11	9	5	4	22	19
Net sales	\$ 18,537,100	\$ 4,445,300	\$14,091,800	\$ 1,163,700	(X)	(X)	\$ 7,335,700	\$ 7,899,800
Total expenses	\$ 1,431,900	\$ 311,200	\$ 1,120,700	\$ 260,900	(X)	(X)	\$ 207,600	\$ 750,000
% of sales ...	7.7	7.0	8.0	22.4	(X)	(X)	2.8	9.5

An (X) indicates that figures are withheld to avoid disclosing individual operations.

Note: This table includes data for only those establishments reporting operating expense figures.

Table 14.--Wholesale Merchants - General Line of Groceries - Comparison of Operating Expenses
for 1923 and 1930, by Economic Divisions

Economic Division	1923			1930		
	Number of establishments reporting	Average sales per establishment	Operating expenses per cent of sales	Number of establishments reporting	Average sales per establishment	Operating expenses per cent of sales
		\$	%		\$	%
CANADA	270	717,800	7.9	312	572,400	8.3
Maritime Provinces ..	56	457,000	8.0	73	322,200	9.7
Quebec	79	609,500	8.6	90	432,700	8.6
Ontario	93	676,300	7.6	70	649,600	8.1
Prairie Provinces ..)	42	1,360,900	7.6	58	908,200	7.8
British Columbia ...)				21	882,700	7.7

Table 15.--Wholesalers Proper - General Line of Groceries - Operating Expense Analysis
for Sample Number of Firms in 1923, by Economic Divisions

Economic Division	Sales	Total Expenses		Expense Percentage of Net Sales for --						
		Amount	% of sales	Wages	Insurance	Taxes	Advertising	Rent	Delivery	All other expenses
	\$	\$								
CANADA	193,797,200	152,857,000	7.89	4.57	0.21	0.32	0.13	0.22	0.64	1.80
Maritime Provinces	25,592,000	20,490,000	8.01	4.77	0.28	0.40	0.12	0.20	0.46	1.78
Quebec	48,149,100	41,418,000	8.60	4.95	0.23	0.36	0.19	0.33	0.95	1.59
Ontario	62,896,300	47,815,000	7.60	4.57	0.20	0.28	0.08	0.17	0.60	1.70
Prairie Provinces and British Columbia	57,159,300	43,134,000	7.55	4.14	0.17	0.29	0.15	0.19	0.52	2.09

Table 16.--Wholesalers Proper - Groceries and Food Specialties Trade - Total Sales and Indexes of Sales,
1930 to 1935, by Economic Divisions

Economic Division	Total Net Sales						Indexes of Sales (1930 = 100)					
	1930 (Actual)	(Estimated)					1930	1931	1932	1933	1934	1935
		1931	1932	1933	1934	1935						
	\$	\$	\$	\$	\$	\$						
CANADA, Total.	223,838,000	196,208,000	177,738,000	184,436,000	196,503,000	203,245,000	100.0	87.7	79.4	82.4	87.8	90.8
Maritime Provinces .	27,282,000	23,541,000	21,017,000	21,717,000	23,616,000	24,154,000	100.0	86.3	77.0	79.6	86.6	88.5
Quebec	49,991,000	43,363,000	37,345,000	37,807,000	38,600,000	39,188,000	100.0	86.7	74.7	75.6	77.2	78.4
Ontario	65,111,000	57,426,000	53,308,000	55,590,000	60,595,000	61,705,000	100.0	88.2	81.9	85.4	93.1	94.8
Prairie Provinces .	54,970,000	48,497,000	47,442,000	49,171,000	52,547,000	56,104,000	100.0	88.2	86.3	89.5	95.4	102.1
British Columbia ..	26,484,000	23,381,000	18,626,000	20,151,000	21,235,000	22,094,000	100.0	88.3	70.3	76.1	80.2	83.4

Table 17.--Gross Margins for Wholesalers Proper in the Groceries and Food Specialties Trade,
by Kinds of Business and Economic Divisions, 1935

Economic Division	General Line				Food Specialties			
	Number of Firms	Net Sales	Gross Margin		Number of Firms	Net Sales	Gross Margin	
			Amount	Per cent of sales			Amount	Per cent of sales
		\$	\$			\$	\$	
CANADA	177	163,227,600	14,344,000	8.8	37	8,981,700	1,222,100	13.6
Maritime Provinces	46	19,886,400	2,076,500	10.4	7	1,045,800	138,500	13.2
Quebec	56	31,359,200	2,877,300	9.2	10	2,580,100	388,900	15.1
Ontario	45	50,330,000	4,590,400	9.1	10	3,016,000	373,600	12.4
Prairie Provinces	30	61,652,000	4,799,800	7.8	10	2,339,800	321,100	13.7
British Columbia								

Table 18.--Gross Margins for Wholesalers Proper - General Line of Groceries -
by Size of Business, Canada, 1935

Amount of Annual Sales	Number of Firms	Total Sales 1935 \$	Gross Margin	
			Amount \$	% of sales
All Firms, Total	177	163,227,600	14,344,000	8.8
Less than \$100,000	12	729,700	105,200	14.4
\$100,000 - \$199,999	32	4,930,700	567,000	11.5
\$200,000 - \$299,999	31	7,722,200	673,700	8.7
\$300,000 - \$399,999	20	7,036,900	662,300	9.4
\$400,000 - \$499,999	18	8,330,200	776,300	9.3
\$500,000 - \$999,999	35	24,468,700	2,156,200	8.8
\$1,000,000 and over	29	110,009,200	9,403,300	8.5

Table 13.--Distribution of Wholesalers Proper in General Line of Groceries According to Gross Margin
Percentage of Sales, by Economic Divisions, 1935

Gross Margin Percentage of Sales	CANADA			Maritimes	Quebec	Ontario	Prairies and British Columbia
	Number of firms	Per cent	Cumula- tive per cent				
Less than 4 per cent	6	3.4	3.4	1	1	-	4
4.0 - 5.9	15	8.5	11.9	-	4	7	4
6.0 - 6.9	12	6.8	19.7	2	5	1	4
7.0 - 7.9	13	7.4	26.1	2	6	2	3
8.0 - 8.9	25	14.1	40.2	7	6	8	4
9.0 - 9.9	36	20.3	60.5	12	10	10	4
10.0 - 11.9	37	20.9	81.4	14	11	5	7
12.0 - 13.9	14	7.9	89.3	4	4	6	-
14.0 - 15.9	10	5.6	94.9	3	5	2	-
16.0 - 17.9	4	2.3	97.2	-	2	2	-
18.0 - 19.9	1	0.6	97.8	-	1	-	-
20.0 - 24.9	2	1.1	98.9	-	-	2	-
25.0 per cent and over	2	1.1	100.0	1	1	-	-
Total	177	100.0		46	56	45	30

Table 20.--Wholesale Merchants - General Line of Groceries - Comparison of Gross Margin Percentages
of Net Sales for 1923 and 1935, by Economic Divisions

Economic Division	1923			1935		
	Number of establishments reporting	Average sales per establishment	Gross margin per cent of net sales	Number of establishments reporting	Average sales per establishment	Gross margin per cent of net sales
CANADA	270	\$ 717,800	11.3	177	\$ 922,200	8.8
Maritime Provinces	56	457,000	10.8	46	432,300	10.4
Quebec	79	609,500	13.2	56	560,000	9.2
Ontario	93	676,300	10.7	45	1,118,400	9.1
Prairie Provinces and British Columbia	42	1,360,900	10.7	30	2,055,100	7.8

Table 21.--Statistics for Wholesale Grocery Firms Sponsoring Voluntary Chains, Canada, 1935

Year	Number of Wholesale Firms Sponsoring Voluntary Chains	Total Net Sales of Such Firms, 1935	Sales of Such Firms to Voluntary Chains Only, 1935		Number of Stores in Voluntary Chains
			Amount	Per cent of total sales	
1930	21	\$ 76,641,992	\$ 21,721,851	28.34	4,180
1931	26	70,960,527	22,209,172	31.30	4,807
1932	30	69,501,015	23,966,558	34.48	5,355
1933	31	74,442,400	25,250,771	33.92	5,554
1934	32	80,011,584	25,327,815	31.66	5,274
1935	35	80,495,438	25,900,730	32.18	6,121

Table 22.--Wholesale Groceries and Food Specialties Trade - Commodity Sales by Type of Establishment,
Canada, 1930

Commodity	Type of Establishment								
	All Types. Total		Wholesalers Proper				Other Wholesalers		
	Amount	Per cent of total	Exporters	Importers	General line	Other Special-ties	Agents and brokers	Mnfrs.' sales branches	All other
Total Net Sales	\$ 465,629,200	-	Per cent which each commodity forms of total sales						
Reported commodity sales per cent of total net sales ..	78.53	-	-	-	-	-	-	-	-
Total net sales reported by commodities	365,640,900	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00
Bakery products	11,437,200	3.13	-	0.25	1.35	1.94	0.69	6.93	4.59
Bakery products not itemized	1,032,300	0.28	-	0.23	0.14	0.05	-	0.02	0.86
Biscuits and crackers	9,100,200	2.49	-	0.02	1.17	0.73	0.17	6.90	2.72
Other bakery products	1,304,700	0.36	-	-	0.04	1.16	0.52	0.01	1.01
Canned goods	44,774,800	12.25	55.54	5.91	12.92	2.51	20.15	6.78	12.49
Canned goods not itemized	16,240,700	4.45	-	0.08	5.09	1.19	5.51	-	7.79
Canned fruits	4,006,000	1.10	13.66	0.96	1.52	1.00	1.33	0.82	(X)
Canned vegetables	8,826,700	2.41	-	1.01	3.88	0.21	3.26	2.97	0.01
Canned salmon	9,588,100	2.62	27.59	0.02	0.97	0.02	7.53	0.09	4.69
Canned fish and sea foods (other than salmon)	2,833,500	0.77	14.29	0.41	0.49	0.09	1.64	1.25	(X)
Canned meats	1,702,500	0.47	-	3.28	0.44	-	0.67	0.59	(X)
Other canned goods	1,577,300	0.43	-	0.15	0.53	-	0.21	1.06	(X)
Confectionery and soft drinks	6,811,000	1.86	-	3.06	2.33	0.40	0.95	1.72	1.75
Confectionery and soft drinks not itemized	2,574,000	0.70	-	2.99	0.34	0.18	0.06	0.28	1.63
Candy	2,911,100	0.80	-	0.05	1.24	0.22	0.23	1.39	0.11
Chewing gum	436,600	0.12	-	-	0.30	-	0.04	-	(X)
Ice cream and frozen ices	5,900	(X)	-	-	(X)	-	-	-	-
Bottled beverages	329,400	0.09	-	-	0.18	-	0.22	-	(X)
Other confectionery	554,000	0.15	-	0.02	0.27	-	0.40	0.05	(X)

(X) Less than 0.01 per cent.

Table 22.--Wholesale Groceries and Food Specialties Trade - Commodity Sales by Type of Establishment,
Canada, 1930 (Continued) -

Commodity	Type of Establishment								
	All Types, Total		Wholesalers Proper				Other Wholesalers		
	Amount	Per cent of total	Exporters	Importers	All Other General line	Specialties	Agents and brokers	Mnfrs.' sales branches	All other
	\$								
Dairy products and eggs	19,817,200	5.42	-	0.88	4.70	5.95	2.24	-	12.89
Dairy products not itemized	11,940,800	3.27	-	-	1.43	(X)	-	-	11.04
Milk and cream, fluid	87,300	0.02	-	-	0.02	0.04	-	-	0.06
Milk, evaporated, condensed and powdered	3,299,300	0.90	-	0.01	1.80	5.21	0.42	-	(X)
Butter	2,214,300	0.61	-	0.02	0.70	0.67	0.01	-	1.28
Cheese	1,515,000	0.41	-	0.84	0.51	0.02	1.79	-	0.05
Eggs	752,900	0.21	-	0.01	0.24	-	0.01	-	0.46
Other (except poultry)	7,600	(X)	-	-	(X)	-	0.01	-	-
Fish and sea foods	2,453,900	0.67	6.89	0.08	0.25	0.35	0.74	-	1.64
Fish and sea foods not itemized ..	900,200	0.25	-	-	0.08	-	0.06	-	0.84
Fresh and frozen fish	750,300	0.21	0.07	-	0.02	-	0.05	-	0.77
Cured and processed fish	601,800	0.16	3.88	0.08	0.14	-	0.63	-	-
Other sea foods (except canned) ..	201,600	0.05	2.94	-	0.01	0.35	-	-	0.03
Fruits and vegetables	12,229,900	3.34	1.32	0.47	4.55	2.61	6.58	0.23	3.23
Fruits and vegetables not itemized	3,861,800	1.06	-	-	0.57	0.46	0.59	-	3.10
Fruits, fresh	2,126,800	0.58	1.30	-	1.40	-	0.17	-	0.08
Vegetables, fresh	552,500	0.15	-	(X)	0.36	-	0.06	-	0.04
Fruits, dried	5,162,500	1.41	0.02	0.29	2.05	2.15	5.01	0.23	0.01
Vegetables, dried	526,300	0.14	-	0.17	0.17	-	0.75	-	-
Groceries	208,434,000	57.00	28.27	81.16	51.69	64.91	61.63	73.30	47.29
Groceries not itemized	41,045,000	11.23	11.76	3.53	6.87	5.53	7.23	0.02	30.14
Cereal preparations	10,978,100	3.00	0.52	0.21	3.69	0.10	1.13	6.78	0.65
Coffee	5,053,800	1.38	-	9.04	1.49	5.53	1.04	0.82	0.19
Extracts and spices	1,827,300	0.50	-	1.26	0.86	0.36	0.53	0.33	(X)
Flour	44,024,300	12.04	6.34	0.47	2.49	10.95	2.59	36.41	13.50
Nuts	3,786,100	1.04	2.01	6.88	0.88	4.60	2.77	-	(X)
Lard, lard substitutes and cooking fats	1,396,300	0.38	-	0.04	0.77	1.51	0.05	-	0.13
Pickles, preserves, jellies, jams and sauces	6,843,400	1.87	2.68	0.07	2.68	1.70	2.63	2.53	0.02

Table 22.--Wholesale Groceries and Food Specialties Trade - Commodity Sales by Type of Establishment,
Canada, 1930 (Continued) -

	\$								
Groceries (Continued) -									
Rice	1,455,000	0.40	-	0.17	0.72	0.02	1.19	-	(X)
Sugar	45,274,000	12.38	-	0.22	13.49	1.66	32.93	19.66	0.46
Tea	12,587,700	3.44	-	36.61	3.01	3.93	3.20	2.72	0.08
Other groceries	34,157,500	9.34	4.96	22.66	14.74	29.02	6.29	3.98	2.12
Meats and meat products	8,100,800	2.22	-	2.26	0.79	0.30	0.01	0.01	7.37
Meats and meat products not itemized	7,245,300	1.98	-	-	0.39	0.30	-	-	7.37
Meats, fresh	35,600	0.01	-	-	0.03	-	-	-	-
Meats, cured or smoked	492,200	0.13	-	0.09	0.34	-	(X)	-	(X)
Poultry and game	12,300	(X)	-	-	0.01	-	-	-	-
Other meat products including sausage (except canned meats) ...	315,400	0.03	-	2.17	0.02	-	0.01	0.01	-
Food products not elsewhere specified	5,455,200	1.49	0.02	5.07	0.70	10.94	1.00	0.72	1.77
Commodities other than food and groceries	46,126,900	12.62	7.96	0.86	20.72	10.09	6.01	10.31	6.98
Commodities other than food and groceries not itemized	4,001,000	1.09	0.35	0.02	2.17	-	-	-	1.08
Chemicals, refined and/or related products	1,957,800	0.54	-	0.06	1.11	(X)	0.40	0.04	0.27
Cigars, cigarettes and tobacco (except leaf)	13,360,700	3.65	-	0.30	9.03	0.04	1.33	-	0.33
Feeds, mixed and other	7,836,900	2.14	-	-	0.72	3.98	0.50	5.99	2.14
Grain	4,151,600	1.14	-	-	0.61	3.47	0.72	3.68	0.01
Hardware	617,400	0.17	0.05	-	0.40	0.02	0.17	-	-
Soap and toilet preparations	9,334,700	2.55	-	0.07	5.16	(X)	0.20	-	2.35
All other	4,866,800	1.34	7.56	0.41	1.52	2.58	2.69	0.60	0.75

-39-

(X) Less than 0.01 per cent.

For explanation of Table 22 see page 12.

Table 23.--Principal Statistics of Food Chains in Canada, by Provinces, 1930 - 1935

(Grocery, Combination and Meat Market Chains Combined)

	1930	1931	1932	1933	1934	1935
CANADA, Total(1) --						
Number of chains	87	90	90	91	86	86
No. of stores (maximum).	2,352	2,410	2,436	2,398	2,395	2,309
Net chain sales	\$127,532,500	\$123,752,500	\$109,815,200	\$103,638,500	\$104,912,800	\$105,635,900
Total sales	\$488,429,600	\$426,908,000	\$369,420,000	\$347,397,000	\$363,056,000	\$370,909,000
%, chains to total	26.1	29.0	29.7	29.8	28.9	28.5
British Columbia --						
Number of chains	19	19	18	17	18	17
No. of stores (maximum).	244	249	268	282	305	295
Net chain sales	\$ 10,117,100	\$ 9,174,400	\$ 8,470,200	\$ 8,862,400	\$ 9,165,300	\$ 10,069,200
Total sales	\$ 37,196,100	\$ 31,163,000	\$ 25,912,000	\$ 24,455,000	\$ 25,737,000	\$ 27,788,000
%, chains to total	27.2	29.4	32.7	36.2	35.6	36.2
Alberta --						
Number of chains	8	9	10	11	10	11
No. of stores (maximum).	120	117	122	127	128	130
Net chain sales	\$ 5,587,000	\$ 5,356,200	\$ 4,377,000	\$ 4,519,100	\$ 4,777,300	\$ 5,250,900
Total sales	\$ 23,469,400	\$ 19,492,000	\$ 16,997,000	\$ 15,970,000	\$ 17,143,000	\$ 18,096,000
%, chains to total	23.8	27.5	28.7	28.3	27.9	29.0

(1) Includes Prince Edward Island, Yukon and Northwest Territories.

Table 23.--Principal Statistics of Food Chains in Canada, by Provinces, 1930 - 1935 (Continued) -
(Grocery, Combination and Meat Market Chains Combined)

	1930	1931	1932	1933	1934	1935
Saskatchewan --						
Number of chains	10	10	9	8	6	6
No. of stores (maximum) ..	165	162	153	138	133	131
Net chain sales	\$ 6,969,300	\$ 6,307,800	\$ 4,963,700	\$ 4,177,600	\$ 4,168,600	\$ 4,558,500
Total sales	\$ 21,690,500	\$ 17,636,000	\$ 14,310,000	\$ 13,109,000	\$ 13,369,000	\$ 13,808,000
%, chains to total	32.1	35.8	34.7	31.9	31.2	33.0
Manitoba --						
Number of chains	8	8	8	6	5	5
No. of stores (maximum) ..	121	119	118	110	109	106
Net chain sales	\$ 5,689,100	\$ 5,486,600	\$ 5,432,100	\$ 4,697,600	\$ 4,895,200	\$ 4,813,800
Total sales	\$ 22,225,200	\$ 18,889,000	\$ 17,082,000	\$ 15,480,000	\$ 16,016,000	\$ 16,555,000
%, chains to total	25.6	29.0	31.8	30.3	30.6	29.1
Ontario --						
Number of chains	37	37	36	37	36	37
No. of stores (maximum) ..	1,107	1,109	1,114	1,113	1,086	1,075
Net chain sales	\$ 70,769,300	\$ 67,093,400	\$ 58,639,900	\$ 55,450,700	\$ 56,563,500	\$ 56,515,600
Total sales	\$206,749,300	\$179,622,000	\$154,793,000	\$146,528,000	\$154,842,000	\$156,730,000
%, chains to total	34.2	37.4	37.9	37.8	36.5	36.1

Table 23.--Principal Statistics of Food Chains in Canada, by Provinces, 1930 - 1935 (Continued) -

(Grocery, Combination and Meat Market Chains Combined)

	1930	1931	1932	1933	1934	1935
Quebec --						
Number of chains	13	12	12	12	12	11
No. of stores (maximum) ..	495	523	515	472	483	425
Net chain sales	\$ 23,708,400	\$ 24,194,600	\$ 21,665,400	\$ 20,456,500	\$ 19,759,700	\$ 18,809,400
Total sales	\$140,527,500	\$126,553,000	\$110,798,000	\$104,204,000	\$106,708,000	\$107,634,000
%, chains to total	16.9	19.1	19.6	19.6	18.5	17.5
New Brunswick --						
Number of chains	5	5	5	5	6	5
No. of stores (maximum) ..	30	37	39	41	43	36
Net chain sales	\$ 1,267,300	\$ 1,675,700	\$ 1,620,200	\$ 1,519,900	\$ 1,441,000	\$ 1,308,400
Total sales	\$ 13,117,200	\$ 11,618,000	\$ 10,298,000	\$ 9,638,000	\$ 10,014,000	\$ 10,301,000
%, chains to total	9.7	14.4	15.7	15.8	14.4	12.7
Nova Scotia --						
Number of chains	9	11	12	14	12	15
No. of stores (maximum) ..	66	92	105	113	105	108
Net chain sales	\$ 3,189,100	\$ 4,288,400	\$ 4,004,000	\$ 3,844,700	\$ 3,954,700	\$ 4,120,900
Total sales	\$ 21,248,900	\$ 19,916,000	\$ 17,385,000	\$ 16,313,000	\$ 17,372,000	\$ 18,075,000
%, chains to total	15.0	21.5	23.0	23.6	22.8	22.8

Table 24.--Voluntary Food Chains in Canada, 1930 - 1935

(Number of Chains, Stores, Value of Purchases and Average Purchases Per Store)

Year	Number of Chains	Number of Stores	Total Purchases by Members (at Wholesale Prices) \$	Average Purchases Per Store \$	Index of Purchases (1930 = 100)
1930	23	4,472	22,720,502	5,081	100.0
1931	26	5,198	23,626,795	4,545	104.0
1932	26	5,790	25,433,064	4,392	111.9
1933	27	6,025	26,725,418	4,436	117.6
1934	23	5,659	26,842,228	4,743	118.1
1935	29	6,465	27,525,349	4,258	121.1

Table 25.--Operating Expenses for Retail Food Stores Classified According to Kind of Business,
Type of Operation and Amount of Annual Sales, Canada, 1930

A. Grocery Stores

	Number of stores	Net Sales (1930) \$	Average sales per store \$	Operating Expenses						Rent per \$100 sales in leased premises
				Total expenses \$	Per \$100 sales	Payroll, including proprietors' services \$	Per \$100 sales	Other oper- ating expen- ses, includ- ing rent \$	Per \$100 sales	
Independent Stores, Total.	6,616	87,667,600	13,251	16,753,100	19.11	10,698,400	12.20	6,054,700	6.91	3.51
Under \$10,000 annual sales	3,730	16,502,900	4,424	4,738,200	28.71	2,804,600	16.99	1,933,600	11.72	7.27
Over \$10,000 annual sales	2,886	71,164,700	24,659	12,014,900	16.88	7,893,800	11.09	4,121,100	5.79	2.58
Independent Stores in Voluntary Chains, Total.	1,306	29,946,800	22,930	4,755,200	15.88	3,000,300	10.02	1,754,900	5.86	2.81
Under \$10,000 annual sales	240	1,473,100	6,138	356,000	24.17	182,000	12.35	174,000	11.82	7.38
Over \$10,000 annual sales	1,066	28,473,700	26,711	4,399,200	15.45	2,818,300	9.90	1,580,900	5.55	2.50
Chain Stores, Total	1,392	69,409,300	49,863	9,459,600	13.63	4,483,500	6.46	4,976,100	7.17	2.16
Under \$10,000 annual sales	13	96,100	7,392	32,500	33.82	18,200	18.94	14,300	14.88	4.02
Over \$10,000 annual sales	1,379	69,313,200	50,263	9,427,100	13.60	4,465,300	6.44	4,961,800	7.16	2.14

Table 25.--Operating Expenses for Retail Food Stores Classified According to Kind of Business.

Type of Operation and Amount of Annual Sales, Canada, 1930 (Continued) -

B. Combination Stores

	Number of stores	Net Sales (1930)	Average sales per store	Operating Expenses						Rent per \$100 sales in leased premises
				Total expenses	Per \$100 sales	Payroll, including proprietors' services	Per \$100 sales	Other oper- ating expen- ses, includ- ing rent	Per \$100 sales	
		\$	\$	\$		\$		\$		
Independent Stores, Total	2,377	61,744,500	25,976	11,342,000	18.37	7,457,200	12.08	3,884,800	6.29	2.39
Under \$10,000 annual sales	616	3,356,900	5,450	1,053,100	31.37	653,600	19.47	399,500	11.90	6.85
Over \$10,000 annual sales	1,761	58,387,600	33,156	10,288,900	17.62	6,803,600	11.65	3,485,300	5.97	2.14
Independent Stores in Voluntary Chains, Total	604	20,709,000	34,286	3,471,600	16.76	2,370,300	11.45	1,101,300	5.31	2.02
Under \$10,000 annual sales	53	333,700	6,296	109,700	32.87	68,100	20.41	41,600	12.46	6.71
Over \$10,000 annual sales	551	20,375,300	36,979	3,361,900	16.50	2,302,200	11.30	1,059,700	5.20	1.94
Chain Stores, Total ⁽¹⁾ ..	689	53,483,300	77,625	9,796,500	18.32	4,841,000	9.05	4,955,500	9.27	2.67

(1) Only 2 combination stores in this group had sales of less than \$10,000, so that in this case no distinction according to size of business is possible.

Table 26.--Sales of Food Commodities (Except Meals) through

(Sales in thousands of dollars)

Kind of Business	Total Food Sales		Bakery products, fresh		Flour		Soda fountain sales and ice cream	
	Amount	%	Amount	%	Amount	%	Amount	%
	\$		\$		\$		\$	
1 Total, All Stores	831,901	100.00	80,565	100.00	34,749	100.00	27,558	100.00
2 Food Group	558,309	67.11	22,804	28.31	12,556	36.13	18,365	66.64
3 Grocery stores (without meat)	208,977	25.12	6,196	7.69	9,007	25.92	602	2.19
4 Combination stores	149,635	17.99	2,753	3.42	3,525	10.14	199	0.72
5 Grocery stores with meats	102,616	12.34	2,382	2.96	3,104	8.93	199	0.72
6 Meat markets with groceries	47,019	5.65	371	0.46	421	1.21	-	-
7 Meat markets	78,057	9.38	139	0.18	-	-	-	-
8 Bakeries and bakery products	10,955	1.31	10,256	12.73	-	-	82	0.30
9 Candy stores - nut stores	3,519	0.42	-	-	-	-	35	0.13
10 Confectionery stores	41,536	4.99	2,880	3.58	-	-	16,029	58.16
11 Dairy products stores	5,281	0.63	-	-	-	-	98	0.35
12 Eggs and poultry stores	1,883	0.23	-	-	-	-	-	-
13 Milk dealers (other than manufacturing dairies) ...	30,010	3.61	-	-	-	-	1,178	4.27
14 Delicatessen stores	2,308	0.28	388	0.48	8	0.02	77	0.28
15 Fruit and vegetable stores	15,610	1.88	77	0.09	16	0.05	66	0.24
16 Fish markets	4,734	0.57	3	-	-	-	-	-
17 Coffee, tea, spices	2,528	0.30	-	-	-	-	-	-
18 Food stores with non-food departments	1,885	0.23	3	-	-	-	-	-
19 Other food stores	1,393	0.17	108	0.14	-	-	-	-
20 Bakeries reporting to the Census of Industry (Retail sales only)	51,605	6.20	51,605	64.05	-	-	-	-
21 Dairies reporting to the Census of Industry (Retail sales only)	28,919	3.48	-	-	-	-	-	-
22 Country general stores	110,620	13.31	3,088	3.83	15,514	44.64	421	1.53
23 Department stores	41,708	5.01	986	1.22	871	2.51	916	3.32
24 General merchandise stores with food departments	10,762	1.29	248	0.31	655	1.89	22	0.08
25 Variety, 5-and-10, to-a-dollar stores	4,789	0.58	85	0.11	-	-	1,107	4.02
26 Cafes (including confectionery)	1,951	0.23	478	0.59	-	-	690	2.51
27 Lunch rooms	952	0.11	378	0.48	-	-	300	1.09
28 Restaurants (table service)	1,450	0.17	607	0.75	-	-	502	1.82
29 Lunch counters and restaurants (10 seats and under) .	468	0.06	-	-	-	-	95	0.35
30 Refreshment booths and soft drink stands	1,117	0.13	-	-	-	-	387	1.41
31 Feed stores (flour, feed, grain, fertilizer)	3,705	0.45	-	-	3,537	10.18	-	-
32 Drug stores	8,810	1.06	-	-	-	-	4,116	14.92
33 Tobacco stores and stands	2,595	0.31	-	-	-	-	520	1.89
34 Miscellaneous kinds of business	4,140	0.50	287	0.35	1,615	4.65	116	0.42

Retail Stores, by Kinds of Business, Canada, 1930

(Sales in thousands of dollars)

Canned goods and other groceries(1)		Fruits and vegetables, fresh		Butter and cheese		Eggs		Milk and cream, fluid		Bottled beverages		Candy, confectionery and nuts		
Amount	%	Amount	%	Amount	%	Amount	%	Amount	%	Amount	%	Amount	%	
\$		\$		\$		\$		\$		\$		\$		
193,262	100.00	67,133	100.00	59,243	100.00	22,774	100.00	57,394	100.00	8,018	100.00	47,937	100.00	1
127,259	65.85	54,733	81.55	44,955	75.88	17,196	75.50	30,741	53.57	4,130	51.50	31,893	66.52	2
83,420	43.16	26,532	39.52	25,077	42.33	8,915	39.14	1,770	3.08	2,132	26.58	5,748	11.99	3
35,939	18.59	11,923	17.76	12,246	20.67	4,430	19.45	1,197	2.10	1,037	12.94	1,750	3.65	4
31,245	16.16	9,535	14.20	9,258	15.63	3,193	14.02	984	1.72	816	10.18	1,623	3.39	5
4,694	2.43	2,388	3.56	2,988	5.04	1,237	5.43	213	0.38	221	2.76	127	0.26	6
904	0.47	1,421	2.12	2,484	4.19	1,159	5.08	177	0.31	-	-	-	-	7
99	0.05	13	0.02	18	0.03	144	0.63	11	0.02	58	0.72	275	0.57	8
-	-	-	-	-	-	-	-	-	-	35	0.44	3,448	7.20	9
369	0.19	1,201	1.79	51	0.09	-	-	231	0.40	558	6.95	20,218	42.17	10
773	0.40	14	0.02	2,581	4.36	1,054	4.62	390	0.68	26	0.33	5	0.01	11
-	-	-	-	103	0.17	585	2.58	11	0.02	-	-	-	-	12
-	-	-	-	1,507	2.54	466	2.05	26,859	46.80	-	-	-	-	13
174	0.09	51	0.08	182	0.31	49	0.22	30	0.05	39	0.48	102	0.21	14
1,043	0.54	13,296	19.81	218	0.37	27	0.12	33	0.06	113	1.40	347	0.72	15
93	0.05	71	0.11	18	0.03	14	0.06	9	0.01	-	-	-	-	16
2,528	1.31	-	-	-	-	-	-	-	-	-	-	-	-	17
1,882	0.98	-	-	-	-	-	-	-	-	-	-	-	-	18
35	0.02	211	0.32	470	0.79	352	1.55	23	0.04	133	1.66	-	-	19
-	-	-	-	-	-	-	-	-	-	-	-	-	-	20
-	-	-	-	2,819	4.76	120	0.53	25,980	45.26	-	-	-	-	21
45,280	23.43	7,068	10.53	7,013	11.84	4,238	18.61	588	1.02	593	7.42	2,883	6.01	22
14,411	7.46	4,299	6.39	3,529	5.96	847	3.72	-	-	396	4.94	2,247	4.69	23
5,843	3.02	669	0.99	694	1.17	321	1.41	84	0.15	96	1.20	148	0.31	24
212	0.11	67	0.10	-	-	-	-	-	-	44	0.55	3,274	6.83	25
-	-	-	-	-	-	-	-	-	-	27	0.34	756	1.58	26
-	-	-	-	-	-	-	-	-	-	110	1.38	164	0.34	27
-	-	-	-	-	-	-	-	-	-	36	0.45	304	0.64	28
-	-	-	-	-	-	-	-	-	-	101	1.26	273	0.57	29
-	-	120	0.18	-	-	-	-	-	-	437	5.44	174	0.36	30
168	0.09	-	-	-	-	-	-	-	-	-	-	-	-	31
-	-	-	-	-	-	-	-	-	-	1,053	13.13	3,642	7.59	32
-	-	-	-	-	-	-	-	-	-	662	8.28	1,413	2.96	33
89	0.04	178	0.26	233	0.39	53	0.23	-	-	331	4.11	767	1.60	34

(1) Does not include canned salmon, sales of which are shown separately.

