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GOVERNMENT OF CANADA



LAUNDRIES, CLEANERS AND DYERS

1948



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LAUNDRIES, CLEANERS AND DYERS

—POWER PLANTS—

—LINEN DISTRIBUTORS—

1 9 4 8

Section I - All Plants Combined

General Summary

Power laundries, dry cleaning, and dyeing plants in Canada numbered 1,081 and had gross receipts of \$71,981,944 in 1948 as compared with 774 plants in 1947 whose gross receipts amounted to \$59,043,678. Increases amounted to 40% in number of plants and 22% in total receipts.

For the purposes of this report, establishments have been classified as either laundries or dry cleaners according to which type of work made up the greater proportion of revenue. On this basis, 294 of the 1,081 plants included in the survey were classified as laundries, while the remaining 787 plants were primarily dry cleaners and dyers.

A separate summary is made, in Table 20, for those establishments specializing in the rental of linens, i.e., coats, towels, overalls, diapers, etc. Some of these do their own ironing, pressing, or packaging, but have no facilities for washing, cleaning, or dyeing on their premises.

Work Performed

The gross receipts for all plants, \$71,981,944, was made up of dry cleaning and dyeing, 53%; laundry, 38%; rentals, 6%; and miscellaneous work, 3%.

Receipts by Provinces

A breakdown of receipts of power laundries, cleaning and dyeing plants by provinces shows that Ontario was responsible for 40% of the total Canadian business, while 26% of receipts originated in the Province of Quebec. British Columbia ranked third with 14% of the Canada total, while Manitoba and Alberta both had 6% of gross receipts. Prince Edward Island and Nova Scotia combined accounted for 3%, as did Saskatchewan, while 2% of the business was done in New Brunswick.

A much higher volume of receipts was reported for all provinces in 1948 than in 1947. The largest increase was for British Columbia where receipts were up 30%. Gains of 23%, 24%, and 26% were recorded for Ontario, Saskatchewan, and Alberta respectively, while increases amounted to 21% in Prince Edward Island and Nova Scotia combined; 19% in New Brunswick; and 18% in Quebec.

Employment

Power laundries and dry cleaning and dyeing establishments employed 25,876 persons in 1948 to whom \$35,877,556 was paid in salaries and wages. In addition, 1,106 proprietors were actively engaged in the operation of their businesses. Of these, 705 withdrew no specific amount to cover their own salaries, but the remaining 401 received salaries amounting to \$882,283.

Power Laundries, Cleaning and Dyeing Plants

Table 1. - Historical Summary Statistics, 1930 - 1948

Year and province	Plants	Employees	Salaries and wages	Cost of materials	Value of work performed
	No.	No.	\$	\$	\$
1930	368	11,885	11,249,945	2,196,139	22,695,880
1931	407	11,772	10,671,615	1,968,029	21,024,684
1932	409	11,170	9,020,441	1,587,586	17,302,779
1933	411	10,528	7,882,389	1,399,646	15,239,981
1934	411	10,376	7,914,089	1,463,432	15,602,612
1935	416	10,752	8,339,134	1,738,936	16,311,261
1936	420	11,568	9,109,548	1,984,734	18,328,345
1937	418	12,551	10,171,710	2,259,265	20,343,152
1938	462	13,302	10,919,398	2,542,215	21,728,830
1939	502	14,212	11,749,858	2,652,329	22,926,474
1940	530	15,508	13,112,465	2,965,125	26,775,841
1941	600	18,398	16,246,296	3,782,530	32,495,470
1942	603	19,839	18,631,692	3,986,450	36,747,368
1943	587	20,597	20,204,624	4,049,361	38,654,761
1944	626	20,991	20,993,502	4,185,542	41,445,857
1945	602	21,379	22,499,459	4,668,779	44,081,170
1946	690	23,554	26,260,679	5,577,433	51,148,159
<u>1947</u>					
CANADA (1)	774	24,856	30,501,536	6,601,626	59,043,678
Prince Edward Island and Nova Scotia ..	41	898	972,534	189,832	1,924,424
New Brunswick	30	647	669,199	161,605	1,399,715
Quebec	124	6,468	8,127,129	1,838,603	15,942,271
Ontario	348	9,787	11,992,539	2,486,312	23,152,339
Manitoba	38	1,789	2,133,057	492,505	3,918,686
Saskatchewan	41	787	945,760	207,986	1,848,725
Alberta	57	1,391	1,652,774	362,710	3,256,436
British Columbia ..	147	3,158	4,008,544	862,073	7,601,082
<u>1948</u>					
CANADA (1)	1,081	25,876	35,877,556	8,538,717	71,981,944
Prince Edward Island and Nova Scotia ..	51	961	1,136,920	256,693	2,319,258
New Brunswick	42	685	795,031	208,900	1,668,993
Quebec	196	6,958	9,285,635	2,385,758	18,826,632
Ontario	462	10,094	14,154,490	3,324,394	28,473,159
Manitoba	47	1,733	2,358,310	598,703	4,442,747
Saskatchewan	54	796	1,077,307	258,557	2,293,764
Alberta	82	1,491	2,089,340	518,003	4,103,898
British Columbia ..	147	3,158	4,980,523	987,709	9,853,493

(1) Excluding Newfoundland.

(2) Including Yukon and Northwest Territories.

Figures from 1941 onward exclude distributors and linen supply houses not engaged in washing, cleaning, or dyeing. Separate figures for the latter are presented in Table 20.

Section II - Power Laundries

General Summary

Power laundry plants in Canada in 1948 numbered 294, an increase of 21% over the 244 plants which reported in the 1947 survey. Gross receipts amounted to \$35,360,996, 16% higher than in 1947. Average volume per plant, however, decreased from \$124,834 in 1947 to \$120,275 in 1948. Laundry receipts per capita increased from \$2.42 in 1947 to \$2.74 in 1948.

The increase of 50 in number of plants as compared with 1947 occurred principally among unincorporated companies. Incorporated businesses registered a gain of only 8 plants while the remaining 42 additional plants were unincorporated companies. Among the unincorporated firms, the additions were chiefly firms with annual receipts of less than \$50,000.

Receipts by Provinces

Ontario and Quebec together accounted for 64% of the total receipts of all power laundries in Canada; the former obtained 34% of the business and the latter, 30%. Power laundries in British Columbia were responsible for 18% of the Canada total while the remaining provinces accounted for from 2% to 6% in each case.

Provincial figures revealed increases in volume of laundry business in all parts of the country. The largest increase over 1947 was that for Prince Edward Island and Nova Scotia combined, a gain of 22%. New Brunswick, Quebec, Ontario, Alberta, and British Columbia registered gains of between 14% and 18%, while increases in Saskatchewan and Manitoba amounted to 12% and 10% respectively.

Work Performed

Power laundries in Canada obtained 71% of their gross receipts, or \$25,116,163, from laundry work. Of this amount, \$16,747,657 or 47% of gross receipts was for finished laundry, 12% for unfinished laundry and 12% for wholesale and industrial laundry. Sixteen per cent of the total dollar volume of business handled by power laundries was for dry cleaning. A higher proportion of the revenue of firms in Western Canada was derived from dry cleaning (17% to 19%) than was the case with those in Eastern Canada where this service provided 11% to 15% of receipts. Coat and towel rentals accounted for 11% of gross receipts while other sources such as overall and wiper cleaning, dyeing, and cleaning and storage of furs, made up the remaining 2%.

Employment

There were 13,923 persons employed in power laundries in Canada during 1948 with salaries and wages of \$18,737,302. This is a decrease in number from 1947 when there were 13,950 employees. On the other hand, the total salary and wage bill showed a substantial increase with the result that the average wage per employee rose to \$1,346 in 1948 as compared with \$1,173 for the previous year. Of the 13,923 employees, 4,201 were males

and 9,722 females.

In addition to these employees, 222 proprietors or partners were actively engaged in the operation of their businesses. Of these, 96 reported a regular salary or drawing account which totalled \$237,624 for the year. The remaining 126 reported that they withdrew no regular amount from the business.

Size of Business

The upward movement in revenue raised the total of firms in the upper receipts class (over \$200,000) to 59 in 1948 from 41 in 1947. These 59 large firms were responsible for 60% of the total business of the industry. Another 54 plants in the class ranging from \$100,000 to \$199,999 accounted for 21% of total gross receipts, while 56 plants in the \$50,000 to \$99,999 range obtained 11% of the business. The remaining 8% of the volume was handled by the 125 plants whose 1948 receipts were less than \$50,000.

Operating Expenses

Operating expenses, as percentages of total receipts, are presented in Tables 7 and 8. Figures have been compiled separately for incorporated and unincorporated businesses. In the case of the latter, the total expenses shown do not include proprietors' salaries or withdrawals nor income taxes.

Incorporated companies.-Incorporated companies reported that operating expenses absorbed 93% of gross receipts. The proportion varied from 99% for the smallest size group to 92% for firms whose 1948 volume exceeded \$300,000. Salary and wage payments amounted to 54% of gross receipts of all laundries, while the cost of materials and supplies was 12%. Fuel and electricity costs averaged 5%, but a higher percentage of revenue was expended for these services by the smaller than by the larger firms. Those in the less than \$20,000 group reported fuel and electricity costs amounting to 13% of gross receipts while, in the \$300,000 and over class, this item amounted to only 4% of total receipts. Other operating expenses, including delivery, pick-up offices (except salaries and wages), depreciation, etc., amounted to 22% of total receipts.

Unincorporated companies.-Unincorporated companies' total expenses, before allowance for proprietors' services or income taxes, amounted to 88% of gross receipts. In this case, the ratio varied from 72% for the "under \$10,000" class to 91% for firms whose volume exceeded \$200,000 in 1948. Employees' salaries and wages took 48% of the combined receipts of all plants while the average cost of fuel and electricity was 7%. Here again, there was a wide variation in the ratios for the different size groups. The cost of materials and supplies used amounted to 12%, while the residual expenses amounted to 21% of receipts.

Power Laundries

Table 2. - Comparison of Operating Results, Canada, 1947 and 1948

Items	1 9 4 7	1 9 4 8	+ Increase - Decrease	
			Amount	%
Plants reporting No.	244	294	+ 50	+20.5
Total receipts \$	30,459,393	35,360,996	+4,901,603	+16.1
Average receipts per plant \$	124,834	120,275	- 4,559	- 3.7
Estimated population of Canada .. No.	12,582,000	12,883,000	+ 301,000	+ 2.4
Laundry receipts per capita \$	2.42	2.74	+ 0.32	+13.2
Plants per 100,000 population .. No	1.9	2.3	+ 0.4	+21.1
Employees - Total No.	13,950	13,923	- 27	- 0.2
Male No.	4,305	4,201	- 104	- 2.4
Female No.	9,645	9,722	+ 77	+ 0.8
Average salary or wage per employee \$	1,173	1,346	+ 173	+14.7
Total salaries and wages \$	16,357,072	18,737,302	+2,380,230	+14.6
Percentage of total receipts .. %	53.7	53.0		
Total cost of fuel and electricity \$	1,647,093	1,946,075	+ 298,982	+18.2
Percentage of total receipts .. %	5.4	5.5		
Cost of materials used \$	3,560,120	4,138,029	+ 577,909	+16.2
Percentage of total receipts .. %	11.7	11.7		
Average cost of materials per plant \$	14,591	14,075	- 516	- 3.5
All other operating expenses ... \$	6,564,853	7,675,156	+1,110,303	+16.9
Percentage of total receipts .. %	21.6	21.7		
Total expenses \$	28,129,138	32,496,562	+4,367,426	+15.5
Percentage of total receipts . %	92.4	91.9		

Power Laundries

Table 3. - Historical Summary Statistics, 1930 - 1948

Year and province	Plants	Total employees (1)	Salaries and wages	Cost of materials used	Value of work performed
	No.	No.	\$	\$	\$
1930	242	9,100	8,140,177	1,571,747	16,283,555
1931	250	8,807	7,709,856	1,350,015	14,879,919
1932	243	8,292	6,482,339	1,065,906	12,297,061
1933	239	7,616	5,501,305	896,954	10,373,890
1934	236	7,393	5,387,274	945,620	10,588,505
1935	237	7,644	5,667,658	1,118,401	10,983,378
1936	229	7,925	5,997,096	1,274,941	12,023,808
1937	225	8,576	6,678,998	1,403,073	13,163,778
1938	232	8,981	7,029,171	1,542,216	13,734,707
1939	234	9,217	7,465,732	1,617,367	14,267,745
1940	230	10,034	8,156,441	1,808,671	16,719,106
1941	237	11,844	10,120,662	2,348,740	19,816,895
1942	238	12,848	11,678,625	2,533,216	22,396,324
1943	225	13,209	12,338,829	2,530,464	23,436,392
1944	227	13,259	12,780,585	2,491,258	24,559,144
1945	217	13,232	13,651,511	2,717,027	25,463,096
1946	238	13,674	14,647,668	3,073,671	27,427,219
<u>1 9 4 7</u>					
CANADA (2)	244	13,950	16,357,072	3,560,120	30,459,393
Prince Edward Island and Nova Scotia	16	492	491,905	89,614	915,287
New Brunswick	9	313	310,509	68,922	582,440
Quebec	51	3,908	4,721,298	1,096,163	9,075,918
Ontario	98	4,911	5,561,647	1,153,864	10,116,084
Manitoba	12	829	902,214	210,390	1,651,004
Saskatchewan	7	355	409,374	94,725	760,251
Alberta	11	804	940,326	197,304	1,811,234
British Columbia (3)	40	2,338	3,019,799	649,138	5,547,175
<u>1 9 4 8</u>					
CANADA (2)	294	13,923	18,737,302	4,138,029	35,360,996
Prince Edward Island and Nova Scotia	18	523	585,672	123,164	1,121,171
New Brunswick	12	338	353,657	86,667	668,366
Quebec	68	4,215	5,802,260	1,336,743	10,538,370
Ontario	119	4,770	6,292,949	1,366,593	11,791,508
Manitoba	12	758	937,690	259,423	1,810,495
Saskatchewan	7	335	466,014	101,414	847,513
Alberta	16	800	1,173,404	274,401	2,127,285
British Columbia (3)	42	2,184	3,365,656	589,624	6,456,288

(1) Includes salaried employees and wage-earners.

(2) Not including Newfoundland.

(3) Includes Yukon and Northwest Territories.

Power Laundries

Table 4. - Annual Receipts by Type of Service Performed, by Provinces, 1948

Province	Total work performed	Laundry, unfinished		Laundry, finished		Industrial and wholesale laundry		Overall & wiper		Coat and towel rentals	
	Amount	Amount	%	Amount	%	Amount	%	Amount	%	Amount	%
	\$	\$		\$		\$		\$		\$	
CANADA (1).....	35,360,996	4,298,999	12.2	16,747,657	47.4	4,069,507	11.5	77,671	0.2	3,816,218	10.8
Prince Edward Island and Nova Scotia ...	1,121,171	108,010	9.6	708,774	63.2	135,267	12.1	425	(a)	3,615	0.3
New Brunswick	668,366	65,890	9.9	368,337	55.1	138,878	20.8	-	-	13,656	2.0
Quebec	10,538,370	1,698,734	16.1	4,877,250	46.3	1,125,801	10.7	11,113	0.1	1,152,521	10.9
Ontario	11,791,508	1,670,374	14.2	5,437,080	46.1	1,280,800	10.8	43,398	0.4	1,398,971	11.9
Manitoba	1,810,495	231,498	12.8	803,716	44.4	298,132	16.4	-	-	42,972	2.4
Saskatchewan	847,513	63,194	7.4	453,343	53.5	142,110	16.8	5,800	0.7	1,500	0.2
Alberta	2,127,285	161,235	7.6	922,128	43.3	421,898	19.8	11,478	0.5	41,950	2.0
British Columbia (2) ..	6,456,288	300,064	4.6	3,177,029	49.2	526,621	8.1	5,457	0.1	1,161,033	18.0

Province	Cleaning		Dyeing		Industrial and wholesale cleaning		Cleaning of furs		Storage (furs, coats, etc.)		All other work	
	Amount	%	Amount	%	Amount	%	Amount	%	Amount	%	Amount	%
	\$		\$		\$		\$		\$		\$	
CANADA (1)	5,555,463	16.0	126,570	0.4	173,920	0.5	42,043	0.1	290,385	0.8	52,563	0.1
Prince Edward Island and Nova Scotia ...	164,680	14.7	200	(a)	200	(a)	-	-	-	-	-	-
New Brunswick	74,162	11.1	7,443	1.1	-	-	-	-	-	-	-	-
Quebec	1,485,032	14.1	19,560	0.2	23,741	0.2	5,236	(a)	127,067	1.2	12,315	0.1
Ontario	1,711,231	14.5	20,103	0.2	116,811	1.0	15,451	0.1	93,554	0.8	3,735	(a)
Manitoba	311,067	17.2	43,204	2.4	25,250	1.4	3,862	0.2	26,721	1.5	24,073	1.3
Saskatchewan	176,066	20.8	-	-	3,000	0.3	-	-	2,000	0.2	500	0.1
Alberta	518,627	24.4	30,569	1.4	1,000	(a)	3,700	0.2	14,700	0.7	-	-
British Columbia (2) ..	1,224,598	19.0	5,491	0.1	3,918	0.1	13,794	0.2	26,343	0.4	11,940	0.2

(1) Not including Newfoundland.

(a) Less than 0.05 per cent.

(2) Including Yukon and Northwest Territories.

Note: The percentages indicate the proportions which receipts for each type of work bear to the total.

Power Laundries

Table 5. - Principal Statistics for Selected Cities, 1948

City	No. of plants	Value of work performed				Employees		Salaries and wages \$
		Total	Laundry	Cleaning	All other work	Male	Female	
		\$	\$	\$	\$			
Halifax	5	562,184	538,168	21,901	2,115	48	195	288,329
Montreal	35	3,473,784	6,144,667	1,045,307	1,283,810	1,199	2,011	4,465,011
Quebec	5	951,911	735,306	193,855	22,750	130	388	573,743
Hamilton	9	1,046,208	832,544	171,290	42,374	120	303	541,223
London	5	857,915	404,866	246,275	206,774	105	218	424,668
Ottawa	10	1,236,690	900,213	277,149	59,328	137	355	684,544
Toronto	35	5,307,099	3,706,492	416,327	1,184,280	593	1,501	2,799,050
Windsor	5	245,193	214,121	2,360	28,712	29	68	131,053
Winnipeg	7	1,607,575	1,173,131	308,662	125,782	202	478	839,248
Calgary	5	1,128,803	754,964	301,637	72,202	105	276	626,959
Vancouver	17	4,017,335	2,306,837	676,689	1,033,809	389	879	2,044,173

Table 6. - Establishments Classified According to Value of Work Performed, Canada, 1947 and 1948

Value of work performed	1947				1948			
	No. of plants	Work performed	%	Average per plant	No. of plants	Work performed	%	Average per plant
		\$		\$		\$		\$
All Plants	244	30,459,393	100.0	124,834	294	35,360,996	100.0	120,275
Less than \$20,000	43	506,780	1.7	11,786	67	759,394	2.2	11,334
\$20,000 to \$29,999	21	549,395	1.8	26,162	20	497,568	1.4	24,878
\$30,000 to \$49,999	32	1,264,898	4.1	39,528	38	1,426,961	4.0	37,552
\$50,000 to \$99,999	54	3,912,596	12.8	72,455	56	3,996,487	11.3	71,366
\$100,000 to \$199,999	53	7,546,434	24.8	142,386	54	7,402,259	20.9	137,079
\$200,000 and over	41	16,679,290	54.8	406,812	59	21,278,327	60.2	360,650

Power Laundries

Table 7. - Operating Costs for Plants Classified by Form of Organization and Amount of Annual Receipts, 1948

Annual receipts	No. of Plants	Average receipts per plant	Operating expenses - expressed as % of total receipts				
			Total expenses	Salaries (1) and wages	Fuel and electricity	Materials and supplies	All other operating expenses (2)
		\$	%	%	%	%	%
Incorporated companies							
All Plants	134	205,080	93.0	54.5	5.1	11.5	21.9
Less than \$20,000	5	15,469	99.1	50.1	12.5	16.6	19.9
\$20,000 to \$29,999 ...	3	24,576	99.7	58.7	10.0	7.6	23.4
\$30,000 to \$49,999 ...	6	41,091	92.9	53.5	10.3	11.9	17.2
\$50,000 to \$99,999 ...	32	73,833	96.9	54.3	7.4	12.9	22.3
\$100,000 to \$199,999 ..	35	140,678	94.2	56.6	5.9	11.9	19.8
\$200,000 to \$299,999 ..	20	241,797	92.8	54.6	5.3	13.2	19.7
\$300,000 and Over	33	453,357	92.1	53.9	4.3	10.6	23.3
Unincorporated Companies							
All Plants	160	49,252	87.9	47.7	6.9	12.3	21.0
Less than \$10,000	28	6,799	72.1	26.0	12.9	15.0	18.2
\$10,000 to \$19,999	34	14,461	81.4	40.3	10.4	11.8	18.9
\$20,000 to \$29,999 ...	17	24,932	82.6	40.7	10.1	11.7	20.1
\$30,000 to \$49,999 ...	32	36,888	87.6	45.7	8.2	13.3	20.4
\$50,000 to \$99,999 ...	24	68,077	84.9	48.1	7.7	11.7	17.4
\$100,000 to \$199,999 ..	19	130,448	91.4	51.9	5.9	14.0	19.6
\$200,000 and Over	6	246,935	91.4	49.1	3.7	9.2	29.4

(1) Not including salaries or drawings of proprietors of unincorporated firms.

(2) Includes call office and delivery expenses except salaries and wages.

Note:-The percentages indicate the proportions that the various expense items bear to the total receipts.

Power Laundries

Table 8. - Operating Costs for Plants Classified by Form of Organization, by Provinces, 1948

Province	No. of plants	Average receipts per plant	Operating expenses - expressed as % of total receipts				
			Total expenses	Salaries (1) and wages	Fuel and electricity	Materials and supplies	All other operating expenses
		\$	%	%	%	%	%
<u>Incorporated Companies</u>							
CANADA (2)	134	205,080	93.0	54.5	5.1	11.5	21.9
Prince Edward Island and Nova Scotia	12	78,611	95.7	53.6	10.4	11.0	20.7
New Brunswick	6	100,819	97.7	54.6	8.8	12.7	21.6
Quebec	28	296,491	94.1	54.1	6.0	12.6	21.4
Ontario	46	173,863	92.1	56.4	5.3	11.4	19.0
Manitoba	10	230,203	93.5	53.8	5.1	13.6	21.0
Saskatchewan							
Alberta	9	200,379	90.4	56.3	2.9	12.9	18.3
British Columbia (3).....	23	240,330	92.5	52.2	2.9	8.8	28.6
<u>Unincorporated Companies</u>							
CANADA (2)	160	49,252	87.9	47.7	6.9	12.3	21.0
Prince Edward Island and Nova Scotia	6	29,639	83.0	45.0	11.4	11.1	15.5
New Brunswick	6	10,576	81.4	37.0	11.9	15.7	16.8
Quebec	40	55,915	89.7	47.8	7.6	13.1	21.2
Ontario	73	51,970	88.6	47.1	6.6	11.9	23.0
Manitoba	9	39,553	79.5	46.4	7.2	13.7	12.2
Saskatchewan							
Alberta	7	46,268	85.0	48.6	4.1	12.8	19.5
British Columbia (3).....	19	48,878	86.4	51.6	5.8	10.9	18.1

(1) Not including salaries or drawings of proprietors of unincorporated companies.

(2) Not including Newfoundland.

(3) Including Yukon and Northwest Territories.

Note:-The percentages indicate the proportions that the various expense items bear to the total receipts.

Power Laundries

Table 9. - Employment, by Provinces, 1948

Province	PROPRIETORS				
	With No Regular Salary		Receiving a Regular Salary		
	Male	Female	Male	Female	Salaries
					\$
CANADA (1)	116	10	91	5	237,624
P.E.I. and N.S.	9	1	1	-	(x)
New Brunswick	7	-	1	-	(x)
Quebec	5	-	25	2	71,131
Ontario	61	6	43	2	122,837
Manitoba	4	-	3	-	3,180
Saskatchewan	6	-	1	-	(x)
Alberta	6	1	3	-	3,952
British Columbia (2)	18	2	14	1	29,124

EMPLOYEES (salaried employees and wage earners)

Province	Number of Employees			Salaries and wages
	Male	Female	Total	
				\$
CANADA (1)	4,201	9,722	13,923	18,737,302
P.E.I. and N.S.	143	380	523	585,672
New Brunswick	76	262	338	353,657
Quebec	1,479	2,736	4,215	5,562,260
Ontario	1,381	3,389	4,770	6,292,949
Manitoba	220	538	758	937,690
Saskatchewan	71	264	335	466,014
Alberta	207	595	800	1,173,404
British Columbia (2)	624	1,560	2,184	3,365,656

(1) Not including Newfoundland

(2) Including Yukon and Northwest Territories

Table 10. - Number of Employees by Months, Canada, 1948

Month	Male	Female	Total
January	4,053	9,560	13,613
February	4,106	9,568	13,674
March	4,137	9,626	13,763
April	4,144	9,731	13,875
May	4,228	9,763	13,991
June	4,310	10,053	14,363
July	4,366	10,097	14,463
August	4,274	9,998	14,272
September	4,197	9,694	13,891
October	4,210	9,620	13,830
November	4,212	9,556	13,768
December	4,165	9,408	13,573
Monthly Average	4,201	9,722	13,923

Section III - Dry Cleaning and Dyeing Plants

General Summary

Statistics given in this report for cleaning and dyeing plants are based on returns from power plants engaged in cleaning unwashable fabrics by the use of solvents other than water. Firms which do not have the necessary facilities for cleaning or dyeing on the premises, but act as middlemen between consumer and plant, are not included.

The number of dry cleaning and dyeing plants in Canada in 1948 was 787, an increase of 257 over the number of plants reporting in 1947. Gross receipts in 1948 for these 787 plants totalled \$36,620,948, 28% higher than the \$28,584,285 received by 530 dry cleaning and dyeing plants in the previous year.

In dry cleaning plants, as in laundries, the marked increase in number of plants occurred among unincorporated firms rather than in the incorporated businesses and growth was largely confined to the smaller size categories.

Receipts by Provinces

Ontario, with 343 of the 787 dry cleaning and dyeing plants, accounted for 46% of the total business of all plants in Canada. Quebec plants numbered 128 and handled 23% of the business, while the 105 plants in British Columbia accounted for 9%. Plants in other provinces were responsible for the following percentages of the total receipts: Manitoba, 7%; Alberta, 5%; Saskatchewan, 4%; New Brunswick, 3%; and Prince Edward Island and Nova Scotia combined, 3%.

On the whole, the volume increase was greater in Western Canada than in the Eastern Provinces. Manitoba was the single exception, its gain of 16% being the lowest among provincial increases. Receipts of dry cleaners and dyers were up 65% over 1947 in British Columbia, 37% in Alberta, and 33% in Saskatchewan. Other provinces showed the following gains: Ontario, 28%; New Brunswick, 22%; Prince Edward Island and Nova Scotia combined, 19%; Quebec, 21%.

Work performed

Dry cleaners tend to provide a more specialized type of service than do laundries. Of the total dollar receipts, 84% was for cleaning. Six per cent of their total receipts was derived from laundry work, while dyeing accounted for 4%. Other services, such as linen supply rentals, storage, etc., were responsible for the remaining 6% of the business.

Employment

Employees engaged in the dry cleaning and dyeing industry in 1948 numbered 11,953, 1,047 more than the 10,906 persons who were employed in this industry in 1947, a gain of 10%. Of the 11,953 persons, 5,273 were male employees and 6,680 were female. Total salaries and wages paid to all employees during the year (including salaries paid to executives of incorporated companies but not to proprietors of unincorporated businesses) totalled \$17,140,254. The average salary per employee was \$1,434 in 1948 as compared with \$1,297 in the previous year.

Proprietors actively engaged in the operation of their businesses and not included in the above figures numbered 884. Of these, 305 reported regular salaries amounting to \$644,659, while the remaining 579 drew no fixed amounts from the business.

Size of Business

Of the 787 dry cleaning and dyeing plants in Canada in 1948, 68 plants whose volume of business in that year exceeded \$100,000 obtained 46% of the total receipts for all plants. Another 103 plants with annual receipts of between \$50,000 and \$100,000 were responsible for 20% of gross receipts, while 146 plants with a volume of between \$30,000 and \$40,000 handled 15% of the total business. The remaining 470 plants had a volume of less than \$30,000 and obtained 19% of the total receipts.

Operating Expenses

Incorporated companies.-Operating expenses of the 147 incorporated firms amounted to 93.5% of their gross receipts but this ratio varied according to the volume of annual receipts. For plants in the less than \$15,000 class, total expenses amounted to 98.5% of gross receipts. This ratio decreased as the size of business increased. Firms in the \$300,000 and over class expended 91.4% of their gross receipts on operating costs.

Salaries and wages paid by incorporated companies amounted to 52% of gross receipts while materials and supplies cost 12%. Fuel and electricity costs were 4% of total receipts while other expenses, such as delivery, maintenance, depreciation, etc., amounted to 26% of receipts.

Unincorporated companies.-The ratio of expenses to receipts for unincorporated companies was 83%, before allowances for proprietors' withdrawals or income taxes. Employees' salaries amounted to 41%, but here again, as in unincorporated laundries, the ratio of salaries to receipts varied directly with the size of business. Firms whose 1948 volume was less than \$7,500 paid only 25% in salaries and wages. This proportion increased with each size group. Firms with a volume of over \$100,000 paid 49% of gross receipts to employees in salaries and wages. The cost of materials and supplies for unincorporated firms amounted to the same proportion as for incorporated businesses, viz. 12%, while fuel and electricity costs were slightly higher at 5.5%. Miscellaneous expenses, including delivery, maintenance, occupancy, etc., amounted to 24%.

Cleaning and Dyeing Plants

Table 11. - Comparison of Operating Results, Canada, 1947 and 1948

Items		1 9 4 7	1 9 4 8	+ Increase - Decrease	
				Amount	%
Plants reporting	No.	530	787	+ 257	+48.5
Total receipts	\$	28,584,285	36,620,948	+8,036,663	+28.1
Average receipts per plant	\$	53,933	46,532	- 7,401	-13.7
Estimated population of Canada ..	No.	12,582,000	12,883,000	+ 301,000	+ 2.4
Receipts per capita	\$	2.27	2.84	+ 0.57	+25.1
Plants per 100,000 population ..	No.	4.2	6.1	+ 1.9	+45.2
Employees -					
Total	No.	10,906	11,953	+ 1,047	+ 9.6
Male	No.	4,938	5,273	+ 335	+ 6.8
Female	No.	5,968	6,680	+ 712	+11.9
Average salary or wage per employe	\$	1,297	1,434	+ 137	+10.6
Total salaries and wages	\$	14,144,464	17,140,254	+2,995,790	+21.2
Percentage of total receipts...	%	49.5	46.6		
Total cost of fuel and electricity	\$	1,208,594	1,716,129	+ 507,535	+42.0
Percentage of total receipts...	%	4.2	4.7		
Total cost of materials and supplies	\$	3,041,506	4,400,688	+1,359,182	+44.7
Percentage of total receipts ..	%	10.7	12.0		
Average cost of supplies per plant	\$	5,771	5,592	- 179	- 3.1
All other operating expenses	\$	7,121,955	9,185,515	+2,063,560	+29.0
Percentage of total receipts ..	%	24.9	25.1		
Total expenses	\$	25,516,519	32,442,586	+6,926,067	+27.1
Percentage of total receipts ..	%	89.3	88.6		

Cleaning and Dyeing Plants

Table 12. - Historical Summary Statistics, 1930 - 1948

Year and province	Plants	Total employees	Salaries and wages	Cost of materials used	Value of work performed
	No.	(1) No.	\$	\$	\$
1930	126	2,785	3,109,768	624,392	6,412,325
1931	157	2,965	2,961,759	618,014	6,144,765
1932	166	2,878	2,538,102	521,680	5,005,718
1933	172	2,912	2,381,084	502,692	4,866,091
1934	175	2,983	2,526,815	517,812	5,014,107
1935	179	3,108	2,671,476	620,535	5,327,883
1936	191	3,643	3,112,452	709,793	6,304,537
1937	193	3,976	3,492,712	856,192	7,179,374
1938	230	4,320	3,890,227	999,999	7,994,123
1939	268	4,995	4,284,126	1,034,952	8,658,729
1940	300	5,474	4,956,024	1,156,454	10,056,735
1941	363	6,554	6,125,635	1,433,790	12,678,275
1942	365	6,990	6,969,167	1,453,234	14,353,064
1943	362	7,388	7,865,795	1,518,897	15,218,369
1944	399	7,732	8,212,917	1,694,284	16,886,713
1945	385	8,147	8,847,948	1,951,752	18,618,074
1946	452	9,880	11,613,011	2,503,762	23,720,940
<u>1947</u>					
CANADA (2)	530	10,906	14,144,464	3,041,506	28,584,285
Prince Edward Island and Nova Scotia ...	25	406	480,629	100,218	1,009,137
New Brunswick	21	334	358,690	92,683	817,275
Quebec	73	2,560	3,405,831	742,440	6,866,353
Ontario	250	4,876	6,430,892	1,332,448	13,036,255
Manitoba	26	960	1,230,843	282,115	2,267,682
Saskatchewan	34	432	536,386	113,261	1,088,474
Alberta	46	587	712,448	165,406	1,445,202
British Columbia (3) ..	55	751	988,745	212,935	2,053,907
<u>1948</u>					
CANADA (2)	787	11,953	17,140,254	4,400,688	36,620,948
Prince Edward Island and Nova Scotia ...	33	438	551,248	133,529	1,198,087
New Brunswick	30	347	441,374	122,233	1,000,627
Quebec	128	2,743	3,723,375	1,049,015	8,288,262
Ontario	343	5,324	7,861,541	1,957,801	16,681,651
Manitoba	35	975	1,420,620	339,280	2,632,252
Saskatchewan	47	461	611,293	157,143	1,446,251
Alberta	66	691	915,936	243,602	1,976,613
British Columbia (3) .	105	974	1,614,867	398,085	3,397,205

(1) Including salaried employees and wage-earners.

(2) Not including Newfoundland.

(3) Including Yukon and Northwest Territories.

Cleaning and Dyeing Plants

Table 13. - Annual Receipts by Type of Service Performed, by Provinces, 1948

Province	Total receipts		Cleaning (except furs)		Cleaning furs		Industrial and wholesale cleaning		Dyeing	
	Amount		Amount	%	Amount	%	Amount	%	Amount	%
	\$		\$		\$		\$		\$	
CANADA (1)	36,620,948		28,928,393	79.0	116,561	0.3	1,859,974	5.1	1,499,660	4.1
Prince Edward Island and Nova Scotia	1,198,087		1,065,253	88.9	7,196	0.6	25,597	2.1	41,754	3.5
New Brunswick	1,000,627		773,043	77.3	-	-	-	-	33,743	3.4
Quebec	8,288,262		6,164,254	74.4	43,095	0.5	365,598	4.4	633,823	7.6
Ontario	16,681,651		13,170,125	79.0	21,488	0.1	1,133,066	6.8	537,906	3.2
Manitoba	2,632,252		1,863,117	70.8	23,089	0.9	31,300	1.2	90,554	3.4
Saskatchewan	1,446,251		1,292,573	89.4	14,729	1.0	4,100	0.3	19,935	1.4
Alberta	1,976,613		1,701,050	86.1	5,764	0.3	59,795	3.0	48,556	2.5
British Columbia (2)	3,397,205		2,898,978	85.3	1,200	(x)	240,518	7.1	93,389	2.8

Province	Coat and towel supply		Laundry unfinished		Laundry (3) finished		Storage (furs, coats, etc.)		All other work (4)	
	Amount	%	Amount	%	Amount	%	Amount	%	Amount	%
	\$		\$		\$		\$		\$	
CANADA (1)	285,246	0.8	280,272	0.8	1,872,947	5.1	811,868	2.2	966,027	2.6
Prince Edward Island and Nova Scotia	-	-	500	(x)	20,434	1.7	15,090	1.3	22,263	1.9
New Brunswick	-	-	10,782	1.1	175,465	17.5	5,504	0.5	2,090	0.2
Quebec	10,533	0.1	179	(x)	385,624	4.6	166,271	2.0	518,885	6.3
Ontario	264,620	1.6	97,057	0.6	748,405	4.5	488,522	2.9	220,462	1.3
Manitoba	10,093	0.4	87,250	3.3	369,710	14.0	57,204	2.2	99,935	3.8
Saskatchewan	-	-	-	-	-	-	55,788	3.8	59,126	4.1
Alberta	-	-	70,000	3.5	36,218	1.8	17,344	0.9	37,886	1.9
British Columbia (2)	-	-	14,504	0.4	137,091	4.0	6,145	0.2	5,380	0.2

(1) Not including Newfoundland. (2) Including Yukon and Northwest Territories.

(3) Including industrial and wholesale laundry. (4) Including overall and wiper cleaning. (x) Less than 0.05 p.c.

Note: The percentages indicate the proportions which receipts for each type of work bear to the total.

Cleaning and Dyeing Plants

Table 14. - Principal Statistics for Selected Cities, 1948

City	No. of Plants	Value of work performed				Employees		Total salaries and wages
		Total	Cleaning	Laundry	All other work	Male	Female	
		\$	\$	\$	\$			\$
Halifax	5	515,855	444,171	-	71,684	78	121	276,314
Moncton	5	154,072	144,072	10,000	-	23	26	71,103
Saint John	8	505,623	323,462	161,547	18,614	64	126	241,261
Montreal	32	5,346,315	3,934,955	357,437	1,053,923	943	848	2,509,216
Quebec	8	674,996	552,196	-	122,800	146	118	310,151
St. Jerome	4	78,273	72,456	-	5,817	19	4	25,911
Three Rivers	5	336,878	296,546	-	40,332	55	51	139,266
Belleville	6	208,214	174,363	21,600	12,251	39	35	90,424
Brantford	7	539,207	345,001	141,986	52,220	70	99	291,965
Chatham	4	145,748	142,548	-	3,200	23	21	68,524
Cornwall	7	177,310	177,077	-	233	31	18	72,589
Fort William	4	261,945	238,770	-	23,175	24	69	139,169
Guelph	5	176,091	157,341	14,732	4,018	25	31	79,355
Hamilton	18	1,112,009	959,257	58,785	93,967	164	235	560,582
Kingston	5	286,548	255,368	20,000	11,180	38	59	147,500
London	10	472,091	418,562	-	53,729	72	76	228,861
Oshawa	6	132,659	128,570	-	4,089	17	30	63,849
Ottawa	14	929,806	803,893	23,166	102,747	137	250	487,992
Peterborough	6	147,797	141,649	-	6,148	16	21	54,553
St. Catharines	7	241,428	239,361	-	2,067	32	42	121,935
St. Thomas	4	164,998	151,194	-	13,804	22	27	70,029
Sarnia	5	163,740	153,940	-	9,800	20	33	72,246
Sault Ste. Marie	5	133,889	129,889	-	4,000	11	40	50,698
Stratford	4	106,088	102,926	-	3,162	20	12	50,021
Sudbury	7	213,068	189,768	20,000	3,300	22	49	85,890
Timmins	4	211,013	201,663	-	9,350	22	25	80,055
Toronto	57	6,393,001	5,172,799	304,299	915,903	962	1,021	3,102,660
Welland	5	130,537	125,980	-	4,557	23	17	62,472
Windsor	24	1,337,023	1,062,254	196,273	78,496	154	297	668,640

Continued on page 19.

Cleaning and Dyeing Plants

Table 14. - Principal Statistics for Selected Cities, 1948 (cont'd)

City	No. of Plants	Value of work performed				Employees		Total salaries and wages
		Total	Cleaning	Laundry	All other work	Male	Female	
		\$	\$	\$	\$			\$
Winnipeg	21	2,401,490	1,680,903	456,960	263,627	336	565	1,337,347
Regina	9	475,380	414,820	-	60,560	55	87	211,784
Saskatoon	11	511,063	436,657	-	74,406	59	109	229,972
Calgary	15	581,885	547,292	-	34,593	46	141	267,289
Edmonton	19	886,075	714,837	102,000	69,238	79	272	469,169
Lethbridge	5	139,014	136,014	-	3,000	17	33	63,313
Nanaimo	4	131,182	130,007	-	1,175	13	30	53,280
New Westminster ...	7	129,484	125,189	350	3,945	12	30	61,553
Penticton	4	73,626	73,126	-	500	7	16	30,479
Vancouver	36	1,917,463	1,743,131	100,300	74,032	184	313	943,750
Victoria	9	442,013	430,984	-	11,029	65	96	252,782

Table 15. - Establishments Classified According to Value of Work Performed, Canada, 1947 and 1948

Value of work performed	1947				1948			
	No. of Plants	Work performed	%	Average per plant	No. of plants	Work performed	%	Average per plant
		\$		\$		\$		\$
All Plants .	530	28,584,285	100.0	53,933	787	36,620,948	100.0	46,532
Less than \$15,000	127	1,331,768	4.6	10,486	244	2,304,552	6.3	9,445
\$15,000 to \$19,999 ..	59	1,005,049	3.5	17,035	96	1,641,390	4.5	17,098
\$20,000 to \$29,999 ..	99	2,428,884	8.5	24,534	130	3,114,047	8.5	23,954
\$30,000 to \$49,999 ..	110	4,129,525	14.5	37,541	146	5,602,030	15.3	38,370
\$50,000 to \$99,999 ..	80	5,381,294	18.8	67,266	103	7,124,566	19.4	69,171
\$100,000 and Over ...	55	14,307,765	50.1	260,142	68	16,834,363	46.0	247,564

Cleaning and Dyeing Plants

Table 16. - Operating Costs for Plants Classified by Form of Organization and Amount of Annual Receipts, 1948

Annual receipts	No. of plants	Average receipts per plant	Operating expenses - expressed as % of total receipts				
			Total expenses	Salaries (1) and wages	Fuel and electricity	Materials and supplies	All other operating expenses (2)
		\$	%	%	%	%	%
Incorporated Companies							
All Plants	147	132,447	93.5	51.6	4.0	11.7	26.2
Less than \$15,000	7	11,943	98.5	55.0	9.5	15.1	18.9
\$15,000 to \$19,999 ...	6	16,808	92.0	51.1	5.4	12.4	23.1
\$20,000 to \$29,999 ...	11	24,320	98.9	54.6	6.6	11.2	26.5
\$30,000 to \$49,999 ...	34	39,441	97.1	52.8	5.6	11.8	26.9
\$50,000 to \$99,999 ...	34	74,267	94.2	53.1	4.8	13.0	23.3
\$100,000 to \$199,999 .	28	139,106	95.3	55.5	3.7	11.5	24.6
\$200,000 to \$299,999 .	11	255,230	94.3	52.5	4.0	12.7	25.1
\$300,000 and Over	16	528,074	91.4	48.9	3.4	11.0	28.1
Unincorporated Companies							
All Plants	640	26,799	83.0	41.3	5.5	12.4	23.8
Less than \$7,500	76	5,412	73.7	24.9	9.1	15.9	23.8
\$7,500 to \$9,999	48	8,838	74.0	25.3	7.8	17.2	23.7
\$10,000 to \$14,999 ...	113	12,260	76.9	31.9	7.5	12.8	24.7
\$15,000 to \$19,999	90	17,117	78.3	36.4	6.8	12.9	22.2
\$20,000 to \$29,999	119	23,920	82.6	41.8	5.9	12.4	22.5
\$30,000 to \$49,999	112	38,045	82.5	42.0	4.8	12.6	23.1
\$50,000 to \$99,999	69	66,659	86.0	44.8	4.3	11.5	25.4
\$100,000 and Over	13	129,438	90.8	49.3	5.5	11.5	24.5

(1) Not including salaries or drawings of proprietors of unincorporated businesses.

(2) Including call office and delivery expenses except salaries and wages.

Note: The percentages indicate the proportions that the various expense items bear to the total receipts.

Cleaning and Dyeing Plants

Table 17. - Operating Costs for Plants Classified by Form of Organization, by Provinces, 1948

Province	No. of plants	Average receipts per plant	Operating expenses - expressed as % of total receipts				
			Total expenses	Salaries (1) and wages	Fuel and electricity	Materials and supplies	All Other operating expenses
		\$	%	%	%	%	%
<u>Incorporated Companies</u>							
CANADA (2)	147	132,447	93.5	51.6	4.0	11.7	26.2
Prince Edward Island and Nova Scotia	10	69,139	95.8	53.2	7.2	10.8	24.6
New Brunswick	9	57,043	94.2	50.6	6.4	12.3	24.9
Quebec	27	198,207	89.9	46.9	4.4	12.2	26.4
Ontario	54	149,654	93.9	52.0	3.6	11.0	27.3
Manitoba	9	225,603	96.0	58.9	3.1	12.8	21.2
Saskatchewan	8	73,346	91.4	48.4	3.8	12.2	27.0
Alberta	10	68,940	98.3	58.1	3.1	9.8	27.3
British Columbia (3) ..	20	76,273	98.0	54.8	4.1	12.6	26.5
<u>Unincorporated Companies</u>							
CANADA (2)	640	26,799	83.0	41.3	5.5	12.4	23.8
Prince Edward Island and Nova Scotia	23	22,030	76.8	36.1	6.9	11.7	22.1
New Brunswick	21	23,202	81.5	37.3	8.2	12.1	23.9
Quebec	101	29,076	84.4	41.3	6.8	13.4	22.9
Ontario	289	29,759	84.0	42.6	5.0	12.4	24.0
Manitoba	26	23,147	83.7	37.4	6.1	13.2	27.0
Saskatchewan	39	22,038	79.3	38.0	6.3	10.0	25.0
Alberta	56	22,986	82.3	40.0	3.9	13.7	24.7
British Columbia (3) ...	85	22,021	80.7	41.6	5.3	11.0	22.8

(1) Not including salaries or drawings of proprietors of unincorporated firms.

(2) Not including Newfoundland.

(3) Including Yukon and Northwest Territories.

Note: The percentages indicate the proportions that the various expense items bear to the total receipts.

Dry Cleaning and Dyeing Plants

Table 18. - Employment, by Provinces, 1948

P R O P R I E T O R S					
Province	With No Regular Salary		Receiving a Regular Salary		
	Male	Female	Male	Female	Salaries
CANADA (1)	545	34	277	28	644,659
P,E,I. and N.S.	22	2	12	-	33,999
New Brunswick	16	1	7	3	15,743
Quebec	81	2	30	3	68,186
Ontario	232	16	145	11	357,490
Manitoba	24	-	10	1	21,401
Saskatchewan	34	2	19	1	38,319
Alberta	55	3	24	6	46,979
British Columbia (2).....	81	8	30	4	62,542

E M P L O Y E E S (salaried employees and wage earners)

Province	Number of Employees			Salaries and wages
	Male	Female	Total	
CANADA (1)	5,273	6,680	11,953	17,140,254
P,E,I. and N.S.	203	235	438	551,248
New Brunswick	130	217	347	441,374
Quebec	1,520	1,223	2,743	3,723,375
Ontario	2,377	2,947	5,324	7,861,541
Manitoba	358	617	975	1,420,620
Saskatchewan	163	298	461	611,293
Alberta	173	518	691	915,936
British Columbia (2)	349	625	974	1,614,867

(1) Not including Newfoundland.

(2) Including Yukon and Northwest Territories.

Table 19. - Number of Employees by Months, Canada, 1948

Month	Male	Female	Total
January	4,937	6,073	11,010
February	4,966	6,165	11,131
March	5,164	6,520	11,684
April	5,439	6,902	12,341
May	5,364	7,091	12,455
June	5,398	7,064	12,462
July	5,411	6,837	12,248
August	5,262	6,725	11,987
September	5,358	6,837	12,195
October	5,428	6,854	12,282
November	5,338	6,675	12,013
December	5,208	6,418	11,626
Monthly Average	5,273	6,680	11,953

Table 20. - Summary Statistics for Firms Specializing
in Linen Supply, 1948

Item		
No. of Establishments	No.	66
Annual Receipts *	\$	4,044,345
Personnel and Payroll:		
Active Proprietors	No.	61
Employees and Wages -		
Male	No.	304
Female	No.	278
Salaries and Wages	\$	886,645
Selected Costs:		
Payments to Plants for Laundry or Cleaning	\$	1,134,406
Fuel and Electricity	\$	23,184
Pick-up and Delivery Costs	\$	519,792
Wrapping Materials and Supplies	\$	52,351

* Decrease between 1947 and 1948 is accounted for by linen supply firms converting to plants.

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