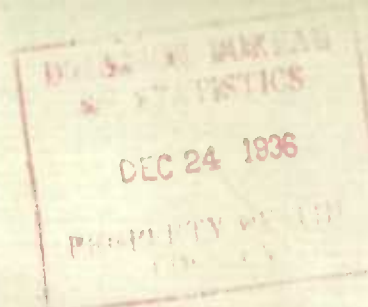


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CANADA

DOMINION BUREAU OF STATISTICS

CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS

RETAIL CHAINS IN CANADA

1935

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CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS.

Retail Chains in Canada, 1935

The position of the corporate chain in relation to the total retail trade of the country remained unchanged in 1935 compared with the preceding year, according to the results of the annual Census of Merchandising and Service Establishments. There were 445 different chain store companies in Canada in 1935 and, together, these operated a total of 8,022 individual units. Total chain sales for the year were \$364,129,800 or 17.9 per cent of the total retail trade, the proportion of chain to total sales remaining unchanged from the preceding year, when 445 chain companies operated 8,210 stores with \$347,186,100 sales. Although the number of chain firms did not vary over the two-year period, their identity was not the same. Thirty-two firms, included in the chain count for 1934, either went out of business in that year or else reduced the number of their stores below the four-store limit necessary for inclusion in the chain store category and were, therefore, omitted from the 1935 figures. This decrease was offset by the introduction of 32 new firms, either through the formation of new companies or the expansion of two- or three-store multiples to full-fledged chains.

The 445 chains operating in 1935 required the services of 30,449 male and 14,920 female employees, to whom \$36,382,000 were paid in salaries and wages. These figures relate to store employees only; head office and warehouse employees and payroll are not included. Stocks on hand at the end of 1935 totalled \$55,062,100, of which goods carried in the stores were valued at \$42,796,200 and warehouse stocks at \$12,265,900. Customers' accounts outstanding on the books of retail chains at the end of 1935 were valued at \$30,471,100.

In addition to the 445 corporate chain companies, there were 37 voluntary chains or groups of independent retailers grouped for buying and/or advertising purposes. These groups were comprised of approximately 7,300 individual members and, although the amount of business these transacted is not known, information was secured to show that purchases at wholesale prices from the affiliated wholesale companies totalled \$31,053,-633.

Scope of Report.--Information covering the operations of chains within each province is to be found in the provincial reports on retail trade which have already been published. In addition, a special report, "Food Chains in Canada, 1935", has also been issued. The present report provides a summary of the activities of retail chains in Canada during 1935 together with comparative figures for earlier years, but it does not give all the detail shown in the provincial reports nor does it give the details regarding food chains to be found in the special report already mentioned. The firms whose activities are summarized here include all organizations operating four or more retail units, exclusive only of department stores. Voluntary chains, in which the various stores are individually owned and operated but which are grouped for buying and/or advertising purposes, are not included with the company chains. A brief reference to these voluntary chains is made in a separate section of this report.

Variations in Chain Ratios by Kinds of Business.--Ratio of chain sales to total sales for most individual lines of business as well as for the total retail trade as a whole remained practically unchanged in 1935 from the preceding year. The only important change was for filling

stations, in which industry the transition of an increasing number of units formerly operated directly by the large gasoline companies to the leased station type resulted in a reduction in the ratio of chain to total sales from 30.5 per cent in 1934 to 25.3 per cent in 1935. A substantial reduction in the number of units of furniture store chains resulted in a decrease in the ratio of chain sales to total for this classification from 19.2 per cent in 1934 to 15.6 per cent in 1935.

Comparison of chain ratios for 1935 and 1930 for those lines of business in which chains are of most importance reveals the differences shown below:

Kind of Business	Chain Ratio		Change
	1930 %	1935 %	
Shoe stores	21.5	30.8	+ 9.3
Grocery and combination stores	29.5	32.5	+ 3.0
Filling stations	22.4	25.3	+ 2.9
Lumber and building material dealers	28.1	30.3	+ 2.2
Hardware stores	6.0	7.7	+ 1.7
Drug stores	18.2	19.8	+ 1.6
Candy and confectionery stores	10.1	10.8	+ .7
Variety stores	89.1	89.4	+ .3
Tobacco stores and stands	25.4	24.8	- .6
Office, school and store supplies and equipment	56.1	54.4	- 1.7
Men's and boys' clothing and furnishings stores (including custom tailors).....	13.7	11.9	- 1.8
Fish and meat markets	9.7	7.2	- 2.5
Women's apparel and accessories stores ..	12.3	10.3	- 2.0
Restaurants and eating places	17.7	14.4	- 3.3
Furniture stores	22.8	15.6	- 7.2
Radio and music stores	21.0	11.3	- 9.7

Variations in Chain Ratios by Provinces.--Slight increases in chain ratios in 1935 over 1934 were recorded in five provinces and slight decreases in four. In comparison with 1930, increases in 1935 were recorded in six provinces and decreases in three. A comparison of the chain ratios for the several provinces for 1930 and 1935 reveals the changes shown below:

Province	Chain Ratio		Change
	1930 %	1935 %	
Nova Scotia	12.2	16.9	+ 4.7
Alberta	14.1	15.3	+ 1.2
Saskatchewan	18.0	19.1	+ 1.1
Ontario	19.5	20.2	+ .7
New Brunswick	14.2	14.8	+ .6
British Columbia	19.3	19.9	+ .6
Prince Edward Island	4.9	4.7	- .2
Manitoba	11.7	11.4	- .3
Quebec	18.0	15.8	- 2.2

Summary by Kinds of Business.--The 445 chain companies operating in 1935 included 73 grocery or combination store chains with 2,151 stores and \$101,418,400 sales. In addition, there were 13 meat market chains with 158 stores and \$4,217,500 sales. Including grocery and combination stores and meat markets, chain sales totalled \$105,635,900 or 28.5 per cent of the total business of all such stores, including both chains and independents. Twenty-nine drug store chains operated a total of 311 unit stores with sales amounting to \$12,164,100 or 19.8 per cent of total drug store sales. There were 38 dealers in lumber and building materials, each of which operated four or more retail yards and are, therefore, included in this chain summary. These 38 companies operated 828 yards with \$11,197,000 sales. Variety store chains numbered 14 and these operated 390 stores with \$37,914,000 sales. Summary statistics showing the number of chains, chain stores and sales, together with the ratios of chain to total sales, are given in Table 2, first, for all retail trade as a whole and then for those lines of business in which chains are of considerable importance.

Chain Store Gross Margins.--The term "gross margin" is used here to represent the amount remaining after deducting the net cost of goods sold from net sales. The net cost of goods sold is calculated from the net cost of goods purchased during the year and from the inventory values at the beginning and close of the period. The net cost of goods purchased includes the invoice value less all returns, allowances and discounts, plus inward freight, cartage to warehouse, duty, insurance in transit, and other expenses incidental to receipt of merchandise. Warehousing charges and costs of transportation from warehouses to stores are not included in the purchase price and all operating expenses of the stores are, of course, excluded. Transportation costs of goods shipped directly from wholesalers, manufacturers or factory to the retail stores were to be included in the value of purchases.

Most of the larger chain store companies, in addition to performing the duties of retailers, carry on the functions of wholesalers in so far as the physical handling of merchandise is concerned. A number of chain companies also indicated that their warehouses carried on a slight amount of wholesale business with other retailers in addition to supplying their own stores. The gross margin figures shown herein are calculated from the difference between the total value of purchases and total sales, including any wholesale sales in addition to store transactions. These figures, therefore, represent the gross profit applicable to the chains' retailing and wholesaling functions combined.

Manufacturer-controlled chains are operated primarily to distribute the products of the manufacturing plants of the parent company. In most cases, data regarding laid down cost of merchandise at the retail branches were not available so that figures for such kind-of-business classifications as household appliance stores and office appliance stores which are operated largely by manufacturing plants are omitted from the tables giving gross margin figures. Many of the candy and confectionery chains indicated that they manufactured the goods which were sold by their branches and figures for these also have been excluded from the tables.

Gross Margins for Selected Kinds of Business

Grocery Chains.--Gross margin for grocery chains formed 15.98 per cent of net sales in 1935 compared with 17.57 per cent in 1934. An exact comparison of these ratios is not valid, however, on account of the reclassification of some firms in the two years as between grocery chains and combination store chains. An analysis of gross margins of grocery chains will be found in the special report, "Food Chains in Canada, 1935", from which it will be seen that gross margin percentage of net sales increases as the size of chain increases.

Combination Store Chains.--Combination store chains operate stores part of which are usually purely grocery units while others sell both groceries and fresh meats. Gross margin for combination store chains as a whole formed 19.99 per cent of net sales in 1935 compared with 19.38 per cent in 1934. A special analysis of combination store chains is also contained in the special report on food chains referred to above.

Meat Market Chains.--Gross margin for meat market chains averaged 23.58 per cent of net sales in 1935 compared with 23.90 per cent in 1934.

Variety Store Chains.--Variety store chain gross margin averaged 36.34 per cent of net sales in 1935 compared with 36.62 per cent in 1934. In Table 8 the variety store chains operating in 1935 are classified according to size, first, on the basis of number of stores and, second, according to amount of annual sales. The ratio of gross margin to total sales is given in each case and it will be noted that the ratio varies directly as the size of chain.

Apparel Group.--Gross margin for men's and boys' clothing and furnishings store chains averaged 32.41 per cent of net sales in 1935 compared with 32.31 per cent in 1934. Gross margin percentage of net sales is slightly lower in the case of women's apparel and accessories than for

men's clothing and furnishings, averaging 31.57 per cent of net sales in 1935 and 30.22 per cent in 1934.

The 24 shoe store chains had average gross margin of 30.03 per cent of net sales in 1935 compared with 28.10 per cent in 1934. Shoe store chains are classified according to size in Table 9 and it is seen that gross margin varied from 25.48 per cent for a group of six companies each having between 6 and 10 stores to 31.94 per cent for three chains each with more than 25 branches. When classified according to total annual business, gross margin varied from 27.25 per cent for 15 chains each with less than \$250,000 sales to 31.14 per cent for four chains each doing more than half a million dollars worth of business.

Lumber and Building Materials Dealers.--While differing in many respects from the ordinary chain store system, lumber and building materials dealers are classified as chains for the Census of Merchandising if they operate four or more retail yards. Gross margin for all lumber and building materials dealer chains averaged 26.48 per cent of net sales in 1935 compared with 25.60 per cent in 1934. In Table 10 these chains are classified according to size both on the basis of the number of yards operated and also according to total annual sales. When classified according to number of yards, gross margin is shown to form 23.19 per cent of sales for a group of six companies each with fewer than six yards and it appears to remain relatively constant at approximately 27 per cent for each of the other size groups. When classified according to total sales, the smaller organizations are again found to operate on the smallest gross margin. These results are somewhat at variance with those shown in the corresponding reports last year where the gross margin percentage was higher for the smaller than the larger firms. Before constructing the tables for 1935, all data relating to gross margin for lumber and building materials dealer chains were verified so that the figures given here are as accurate as it is possible to make them by means of a postal canvass.

Drug Store Chains.--There were 29 drug store chains in Canada in 1935 and these operated 307 stores with \$12,164,100 sales. Gross margin for drug chains averaged 31.48 per cent of sales in 1935 compared with 31.54 per cent in 1934. Drug chains are classified according to size of business in Table 11 and the gross margin applicable to each size class is shown.

Voluntary Chains

According to the information available, there were 37 voluntary chains in Canada in 1935 and these included approximately 7,300 individual members. No information is available to show the value of sales for these chains but, according to reports received, primarily from affiliated wholesale companies, purchases at wholesale prices by members amounted to \$31,053,633 in 1935. Exact data on the extent of the voluntary chain system in Canada are difficult to obtain. A considerable number of wholesale firms which formerly indicated that they were associated with these buying groups now state that they offer the same terms to all their clients. On the other hand, there may be many groups of retail merchants who do some buying on a co-operative basis but which are not recognized or known as voluntary chains.

Voluntary chains continue to function primarily in the grocery field. Of the 37 chains in 1935 for which figures are available, 29 were associated with wholesale grocers. These 29 groups were comprised of 6,465 individual members and purchases at wholesale prices totalled \$27,525,349. A summary of the information available relating to the activities of voluntary chains is presented in Table 12.

Table 1.--Summary of Retail Chains in Canada, 1935

(Number of Chains, Stores, Personnel, Payroll, Sales, Stocks and Accounts Outstanding)

Kind of Business	Number of Chains	Number of Stores 1935		Employment and Wage Facts (Store employees only)			Net Sales, 1935			Stocks on Hand, End of Year, At Cost		Customers' Accounts Outstanding, Dec. 31, 1935
				Male	Female	Salaries and wages	Amount	% of total chain sales	% of (2) total chain sales			
		Average	Maximum							Stores	Warehouses	
All Chains, Total(1)	445	7,666	8,022	30,449	14,920	\$ 36,382,000	\$ 364,129,800	100.00		\$ 42,796,200	\$ 12,265,900	\$ 30,471,100
All Chains Less Government Liquor Stores, Total	437	7,070	7,424	28,767	14,879	33,772,200	307,299,400		100.00	39,704,600	7,819,300	30,471,100
Food Group, Total	104	2,499	2,581	10,992	2,723	8,271,900	112,634,400	30.93	36.65	6,219,000	3,781,300	1,454,000
Bakery product chains(3)	7	76	83	56	178	138,700	868,900	.24	.28	11,900	6,200	8,800
Candy and confectionery chains	9	167	174	290	747	643,800	3,787,100	1.04	1.23	69,100	93,900	33,800
Grocery chains	38	592	611	1,755	670	1,633,500	23,870,900	6.56	7.77	1,683,100	743,700	331,700
Combination store chains	35	1,498	1,540	8,197	1,025	6,005,200	77,547,500	21.30	25.24	4,255,000	2,777,400	709,500
Meat market chains	13	151	158	592	27	455,800	4,217,500	1.16	1.37	108,800	9,500	135,800
Country General Store Chains, Total	27	154	155	522	198	557,300	7,375,600	2.03	2.40	2,009,700	---	1,005,900
General Merchandise Group, Total.	21	448	463	1,379	7,886	5,185,900	40,260,800	11.06	13.10	5,786,700	863,400	73,800
Dry goods store chains	6	62	64)	148	304	296,600	2,346,800	.64	.76	601,900	2,100	65,600
General merchandise store chains	1	9	9)									
Variety, 5-and-10, and to-a-dollar store chains	14	377	390	1,231	7,582	4,889,300	37,914,000	10.41	12.34	5,184,800	861,300	8,200
Automotive Group, Total	33	664	800	3,129	53	3,186,400	22,679,000	6.23	7.38	1,880,000	7,300	920,700
Automobile dealer chains	4	36	36	873	49	1,193,100	9,784,700	2.69	3.18	1,457,400	---	411,400
Filling station chains	27	611	747	2,182	4	1,922,800	12,407,600(4)	3.41	4.04	388,400	7,300	444,400
Apparel Group, Total	68	678	714	1,947	1,291	2,912,000	27,795,500	7.63	9.05	6,061,900	562,800	1,349,700
Men's and boys' clothing and furnish- ings chains (including custom tailors)	14	150	163	571	91	693,400	6,615,100	1.82	2.15	1,070,800	204,500	526,800
Family clothing chains	12	67	69	366	488	805,100	7,829,000	2.15	2.55	1,697,000	8,600	730,000
Women's apparel and accessories chains	18	158	169	49	584	446,500	4,904,200	1.34	1.60	808,400	94,200	34,400
Shoe store chains	24	303	313	961	128	967,000	8,447,200	2.32	2.75	2,485,700	255,500	58,500

(1) Group totals may include figures for classifications which cannot be shown separately without disclosing individual operations.

(2) In computing the percentages in this column, the sales of Government liquor stores have been omitted from the total chain figures.

(3) Exclusive of manufacturing bakeries.

(4) According to revisions received since the main body of this report was compiled, the sales for gasoline filling station chains should be increased by approximately \$500,000.

Table 1.--Summary of Retail Chains in Canada, 1935 (Continued) -
(Number of Chains, Stores, Personnel, Payroll, Sales, Stocks and Accounts Outstanding)

Kind of Business	Number of Chains	Number of Stores 1935		Employment and Wage Facts (Store employees only)			Net Sales, 1935			Stocks on Hand, End of Year, At Cost		Customers' Accounts Outstand- ing, Dec. 31, 1935
							Amount	% of total chain sales	% of (2) total chain sales			
		Average	Maximum	Male	Female	Salaries and wages				Stores	Warehouses	
Buildings Materials Group, Total	53	900	915	1,464	45	1,517,200	15,734,100	4.32	5.12	5,897,200	---	10,182,300
Hardware store chains	12	64	65	294	23	361,600	3,842,900	1.06	1.25	1,210,500	---	635,400
Lumber and building material chains	38	814	828	1,102	7	1,060,800	11,197,000	3.08	3.64	4,535,000	---	9,479,000
Furniture and Household Group, Total	34	394	408	2,811	461	3,328,900	15,235,600	4.18	4.96	2,927,400	590,400	10,666,400
Furniture store chains	8	65	68	408	75	487,600	4,546,300	1.25	1.48	899,600	176,500	2,624,300
Household appliance store chains	19	292	302	2,020	322	2,358,300	8,349,400	2.29	2.72	1,514,600	390,300	6,002,900
Radio and music store chains	5	28	29	308	62	386,200	1,981,700	.54	.64	458,700	---	1,899,300
Restaurant Chains, Total	13	186	209	1,433	1,197	1,585,500	6,584,600	1.81	2.14	130,400	46,100	---
Other Retail Chains, Total	92	1,743	1,777	6,772	1,066	9,116,900	115,830,200	31.81	---	11,883,900	6,414,600	4,818,300
Drug store chains	29	307	311	1,548	361	1,594,800	12,164,100	3.34	3.96	2,152,500	501,100	120,900
Gift, novelty, toy and camera store chains	2	9	10)	570	328	931,900	7,106,100	1.95	2.31	1,769,500	6,800	1,481,600
Jewellery store chains	2	26	26)									
Office, school and store supplies and equipment dealer chains	12	140	141	1,020	115	1,819,500	7,482,500	2.05	2.44	1,505,400	538,200	1,601,100
Tobacco store chains	11	230	241	535	65	624,400	5,736,700	1.58	1.87	492,000	161,900	90,400
Government liquor stores	8	596	598	1,682	41	2,609,800	56,830,400	15.61	---	3,091,600	4,446,600	---
Brewers' warehouse chains	6	39	39	237	26	192,400	12,302,200(3)	3.38	4.00	---	---	---
Unclassified kinds of business	22	396	411	1,180	130	1,344,100	14,208,200	3.90	4.62	2,872,900	760,000	1,524,300

- (1) Group totals may include figures for classifications which cannot be shown separately without disclosing individual operations.
(2) In computing the percentages in this column, the sales of Government liquor stores have been omitted from the total chain figures.
(3) Sales of brewers' warehouse chains include a certain amount of wholesale business.

Table 2.--Principal Statistics of Retail Chains, Selected Kinds of Business,
1930 and 1933-1935

Kind of Business	1930	1933	1934	1935
ALL STORES, TOTAL --				
Chains (number)	518	461	445	445
Stores (maximum)	8,504	8,230	8,210	8,022
Chain sales	\$ 437,336,000	\$ 328,902,600	\$ 347,186,100	\$ 364,129,800
Total sales (all stores)	\$2,755,569,900	\$1,775,618,000	\$1,941,470,000	\$2,035,817,000
%, chains to total	17.7	18.5	17.9	17.9
Candy and Confectionery				
Stores --				
Chains (number)	14	8	10	9
Stores (maximum)	169	167	184	174
Chain sales	\$ 5,448,300	\$ 3,568,500	\$ 3,669,500	\$ 3,787,100
Total sales (all stores)	\$ 54,176,100	\$ 33,010,000	\$ 33,880,000	\$ 35,202,000
%, chains to total	10.1	10.8	10.8	10.8
Grocery and Combination				
Stores --				
Chains (number)	66	75	74	73
Stores (maximum)	2,127	2,221	2,239	2,151
Chain sales	\$ 119,498,600	\$ 98,862,100	\$ 100,874,900	\$ 101,418,400
Total sales (all stores)	\$ 405,403,400	\$ 297,307,000	\$ 307,478,000	\$ 312,197,000
%, chains to total	29.5	33.3	32.8	32.5
Fish and Meat Markets --				
Chains (number)	21	16	12	13
Stores (maximum)	225	177	156	158
Chain sales	\$ 8,083,900	\$ 4,776,400	\$ 4,037,900	\$ 4,217,500
Total sales (all stores)	\$ 83,026,200	\$ 50,090,000	\$ 55,578,000	\$ 58,712,000
%, chains to total	9.7	9.5	7.3	7.2
Variety Stores --				
Chains (number)	15	14	14	14
Stores (maximum)	327	356	372	390
Chain sales	\$ 39,383,600	\$ 33,348,600	\$ 35,646,500	\$ 37,914,000
Total sales (all stores)	\$ 44,212,200	\$ 37,256,000	\$ 40,041,000	\$ 42,409,000
%, chains to total	89.1	89.5	89.0	89.4
Filling Stations --				
Chains (number)	28	30	27	27
Stations (maximum)	743	837	845	747
Chain sales	\$ 14,875,300	\$ 14,071,100	\$ 14,638,000	\$ 12,407,600
Total sales (all stores)	\$ 66,449,300	\$ 48,278,000	\$ 48,037,000	\$ 48,987,000
%, chains to total	22.4	29.1	30.5	25.3
Men's and Boys' Clothing and Furnishings (including custom tailors) --				
Chains (number)	22	14	13	14
Stores (maximum)	191	135	151	163
Chain sales	\$ 9,866,800	\$ 5,405,200	\$ 5,961,600	\$ 6,615,100
Total sales (all stores)	\$ 72,110,500	\$ 44,435,000	\$ 49,901,000	\$ 53,166,000
%, chains to total	13.7	12.2	11.9	12.4
Family Clothing Stores --				
Chains (number)	13	12	12	12
Stores (maximum)	58	63	70	69
Chain sales	\$ 4,746,600	\$ 6,722,000	\$ 7,407,700	\$ 7,829,000
Total sales (all stores)	\$ 42,144,100	\$ 31,582,000	\$ 35,575,000	\$ 37,702,000
%, chains to total	11.3	21.3	20.8	20.8
Women's Apparel and Acces- sories Stores --				
Chains (number)	28	15	15	18
Stores (maximum)	203	148	171	169
Chain sales	\$ 8,584,800	\$ 4,029,400	\$ 4,506,800	\$ 4,904,200
Total sales (all stores)	\$ 69,806,000	\$ 44,699,000	\$ 47,474,000	\$ 47,565,000
%, chains to total	12.3	9.0	9.5	10.3

Table 2.--Principal Statistics of Retail Chains, Selected Kinds of Business,
1930 and 1933-1935 (Continued) -

Kind of Business	1930	1933	1934	1935
Shoe Stores --				
Chains (number)	17	22	22	24
Stores (maximum)	203	274	302	313
Chain sales	\$ 7,702,700	\$ 7,114,800	\$ 8,037,400	\$ 8,447,200
Total sales (all stores)	\$35,908,000	\$25,989,000	\$27,002,000	\$27,431,000
%, chains to total	21.5	27.4	29.8	30.8
Hardware Stores --				
Chains (number)	13	14	14	12
Stores (maximum)	70	76	74	65
Chain sales	\$ 4,218,100	\$ 3,024,500	\$ 4,052,700	\$ 3,842,900
Total sales (all stores)	\$70,891,700	\$42,732,000	\$47,917,000	\$50,043,000
%, chains to total	6.0	7.1	8.5	7.7
Lumber and Building Material Dealers --				
Chains (number)	46	42	42	38
Yards (maximum)	1,035	883	877	828
Chain sales	\$18,597,500	\$ 9,505,700	\$10,570,800	\$11,197,000
Total sales (all stores)	\$66,200,700	\$29,331,000	\$34,302,000	\$36,904,000
%, chains to total	28.1	32.4	30.8	30.3
Furniture Stores --				
Chains (number)	8	9	8	8
Stores (maximum)	96	84	80	68
Chain sales	\$ 9,367,900	\$ 4,317,400	\$ 5,131,000	\$ 4,546,300
Total sales (all stores)	\$41,016,500	\$23,073,000	\$26,765,000	\$29,229,000
%, chains to total	22.8	18.7	19.2	15.6
Radio and Music Stores --				
Chains (number)	7	4	2	5
Stores (maximum)	75	30	19	29
Chain sales	\$ 7,104,100	\$ 1,070,300	(X)	\$ 1,981,700
Total sales (all stores)	\$33,894,200	\$13,440,000	\$15,524,000	\$17,516,000
%, chains to total	21.0	8.0	(X)	11.3
Restaurants --				
Chains (number)	21	17	15	13
Stores (maximum)	262	240	225	209
Chain sales	\$13,438,600	\$ 7,129,300	\$ 6,792,200	\$ 6,584,600
Total sales (all stores)	\$75,977,100	\$41,667,000	\$44,087,000	\$45,825,000
%, chains to total	17.7	17.1	15.4	14.4
Drug Stores --				
Chains (number)	31	29	29	29
Stores (maximum)	292	301	306	311
Chain sales	\$13,971,300	\$11,001,300	\$11,594,000	\$12,164,100
Total sales (all stores)	\$76,848,900	\$57,253,000	\$59,458,000	\$61,353,000
%, chains to total	18.2	19.2	19.5	19.8
Office, School and Store Supplies and Equipment Dealers -				
Chains (number)	16	11	12	12
Stores (maximum)	173	144	139	141
Chain sales	\$11,134,200	\$ 5,332,100	\$ 6,613,300	\$ 7,482,500
Total sales (all stores)	\$19,829,900	\$10,003,000	\$12,269,000	\$13,746,000
%, chains to total	56.1	53.3	53.9	54.4
Tobacco Stores and Stands --				
Chains (number)	9	9	11	11
Stores (maximum)	215	234	238	241
Chain sales	\$ 7,800,700	\$ 5,446,200	\$ 5,652,500	\$ 5,736,700
Total sales (all stores)	\$30,702,800	\$21,586,000	\$22,551,000	\$23,129,000
%, chains to total	25.4	25.2	25.1	24.8
Liquor Stores --				
Chains (number)	9	8	8	8
Stores (maximum)	645	595	607	598
Chain sales	\$100,394,000	\$54,872,700	\$56,206,000	\$56,830,400

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

Table 3.--Principal Statistics of Retail Chains by Provinces, 1930 and 1933-1935

	1930	1933	1934	1935
CANADA --				
Chains (number)	518	461	445	445
Stores (maximum)	8,504	8,230	8,210	8,022
Chain sales	\$ 487,336,000	\$ 328,902,600	\$ 347,186,100	\$ 364,129,800
Total sales (all stores)	\$2,755,569,900	\$1,775,618,000	\$1,941,470,000	\$2,035,817,000
%, chains to total	17.7	18.5	17.9	17.9
Index of chain sales ...	100.0	67.5	71.2	74.7
British Columbia --				
Chains (number)	92	81	79	76
Stores (maximum)	692	740	725	704
Chain sales	\$ 47,875,300	\$ 32,405,600	\$ 33,797,700	\$ 37,218,800
Total sales (all stores)	\$ 248,597,500	\$ 154,751,000	\$ 171,609,000	\$ 187,257,000
%, chains to total	19.3	20.9	19.7	19.9
Index of chain sales ...	100.0	67.7	70.6	77.7
Alberta --				
Chains (number)	104	93	92	87
Stores (maximum)	682	637	627	594
Chain sales	\$ 24,918,500	\$ 17,269,500	\$ 19,059,400	\$ 19,656,400
Total sales (all stores)	\$ 176,537,100	\$ 108,431,000	\$ 120,413,000	\$ 128,202,000
%, chains to total	14.1	15.9	15.8	15.3
Index of chain sales ...	100.0	69.3	76.5	78.9
Saskatchewan --				
Chains (number)	101	90	88	88
Stores (maximum)	1,234	1,046	1,038	1,009
Chain sales	\$ 34,056,300	\$ 20,755,200	\$ 22,104,000	\$ 22,788,800
Total sales (all stores)	\$ 189,181,100	\$ 103,051,000	\$ 111,637,000	\$ 119,137,000
%, chains to total	18.0	20.1	19.8	19.1
Index of chain sales ...	100.0	60.9	64.9	66.9
Manitoba --				
Chains (number)	91	73	70	72
Stores (maximum)	434	374	364	370
Chain sales	\$ 22,105,800	\$ 13,619,700	\$ 14,942,100	\$ 15,630,600
Total sales (all stores)	\$ 189,243,900	\$ 121,224,000	\$ 129,847,000	\$ 137,533,000
%, chains to total	11.7	11.2	11.5	11.4
Index of chain sales ...	100.0	61.6	67.6	70.7
Ontario --				
Chains (number)	250	217	213	206
Stores (maximum)	3,276	3,210	3,223	3,173
Chain sales	\$ 214,391,300	\$ 150,908,000	\$ 161,586,300	\$ 171,540,000
Total sales (all stores)	\$1,099,990,200	\$ 735,861,000	\$ 814,994,000	\$ 848,014,000
%, chains to total	19.5	20.5	19.8	20.2
Index of chain sales ...	100.0	70.4	75.4	80.0
Quebec --				
Chains (number)	175	147	142	139
Stores (maximum)	1,698	1,668	1,680	1,612
Chain sales	\$ 117,100,400	\$ 73,398,300	\$ 72,946,100	\$ 72,810,300
Total sales (all stores)	\$ 651,138,500	\$ 421,139,000	\$ 447,093,000	\$ 461,864,000
%, chains to total	18.0	17.4	16.3	15.8
Index of chain sales ...	100.0	62.7	62.3	62.2
New Brunswick --				
Chains (number)	42	41	42	45
Stores (maximum)	168	190	195	194
Chain sales	\$ 11,958,700	\$ 7,581,300	\$ 8,493,700	\$ 9,055,900
Total sales (all stores)	\$ 84,371,900	\$ 52,249,000	\$ 58,016,000	\$ 61,318,000
%, chains to total	14.2	14.5	14.6	14.8
Index of chain sales ...	100.0	63.4	71.0	75.7

Table 3.--Principal Statistics of Retail Chains by Provinces, 1930 and 1933-1935
(Continued) -

	1930	1933	1934	1935
Nova Scotia --				
Chains (number)	48	50	47	47
Stores (maximum)	227	283	274	283
Chain sales	\$12,163,300	\$11,715,500	\$12,613,200	\$13,623,300
Total sales (all stores)	\$99,519,900	\$68,274,000	\$76,124,000	\$80,409,000
%, chains to total	12.2	17.2	16.6	16.9
Index of chain sales ...	100.0	96.3	103.7	112.0
Prince Edward Island --				
Chains (number)	7	5	7	8
Stores (maximum)	12	8	8	8
Chain sales	\$ 678,700	\$ 350,900	\$ 411,100	\$ 460,200
Total sales (all stores)	\$13,773,700	\$ 8,873,000	\$ 9,649,000	\$ 9,836,000
%, chains to total	4.9	4.0	4.3	4.7
Index of chain sales ...	100.0	51.7	60.6	67.8
Yukon and Northwest Territories --				
Chains (number)	6	4	5	5
Stores (maximum)	81	74	76	75
Chain sales	\$ 2,087,700	\$ 898,600	\$ 1,232,500	\$ 1,345,500
Total sales (all stores)	\$ 3,216,100	\$ 1,765,000	\$ 2,088,000	\$ 2,197,000
%, chains to total	64.9	50.9	59.0	61.2
Index of chain sales ...	100.0	43.0	59.0	64.4

Table 4.--Chains Classified According to Type of Operation

Type of Operation	1934					1935				
	Number of Chains	Number of Stores (Average)	Total Chain Sales	Per Cent of Total Chain Sales	Average Sales Per Store	Number of Chains	Number of Stores (Average)	Total Chain Sales	Per Cent of Total Chain Sales	Average Sales Per Store
All Chains, Total.	445	7,804	\$ 348,384,200	100.00	44,642	445	7,666	\$ 364,129,800	100.00	47,499
Local chains ...	166	1,224	48,096,000	13.81	39,294	156	1,141	53,038,700	14.57	46,484
Provincial chains	169	2,609	130,199,700	37.37	49,904	179	2,661	139,065,000	38.19	52,260
Sectional chains	61	1,607	59,915,800	17.20	37,284	60	1,525	57,218,900	15.71	37,521
National chains.	49	2,364	110,172,700	31.62	46,604	50	2,339	114,807,200	31.53	49,084

Table 5.--Chains Classified According to Number of Units Operated

Size of Chain	1934					1935				
	Number of Chains	Number of Units (Average)	Total Chain Sales	Per Cent of Total Chain Sales	Average Sales Per Unit	Number of Chains	Number of Units (Average)	Total Chain Sales	Per Cent of Total Chain Sales	Average Sales Per Unit
All Chains, Total.	445	7,804	\$ 348,384,200	100.00	44,642	445	7,666	\$ 364,129,800	100.00	47,499
Chains having less than 6 units ...	171	723	34,838,303	10.00	48,186	170	715	37,306,100	10.25	52,176
6 - 10 units ...	126	943	40,446,300	11.61	42,891	128	958	45,368,000	12.46	47,357
11 - 25 units ..	84	1,296	57,459,000	16.49	44,336	86	1,345	68,816,700	18.90	51,165
26 - 50 units ..	30	1,051	37,184,700	10.68	35,380	29	1,004	34,785,700	9.55	34,647
51 - 100 units .	21	1,463	51,010,000	14.64	34,867	19	1,341	51,244,300	14.07	38,213
More than 100 units	13	2,328	127,445,900	36.58	54,745	13	2,303	126,609,000	34.77	54,976

Table 6.--Chains Classified According to Total Sales Volume

Size of Chain	1934					1935				
	Number of Chains	Number of Units (Average)	Total Chain Sales	Per Cent of Total Chain Sales	Average Sales Per Unit	Number of Chains	Number of Units (Average)	Total Chain Sales	Per Cent of Total Chain Sales	Average Sales Per Unit
All Chains, Total	445	7,804	\$ 348,384,200	100.00	\$ 44,642	445	7,666	\$ 364,129,800	100.00	\$ 47,499
Chains having sales of-										
Less than \$100,000 ..	83	461	5,543,600	1.59	12,025	77	394	4,961,200	1.36	12,592
\$100,000-\$250,000 ...	151	1,111	25,215,200	7.24	22,696	150	1,069	24,840,200	6.82	23,237
\$250,000-\$500,000 ...	88	1,035	30,952,200	8.89	29,906	100	1,128	35,443,200	9.73	31,421
\$500,000-\$1,000,000 .	52	992	35,233,600	10.11	35,518	53	932	38,220,300	10.50	41,009
\$1,000,000-\$2,500,000	39	1,303	59,496,800	17.08	45,661	37	1,243	57,961,500	15.92	46,630
\$2,500,000-\$5,000,000	14	987	48,327,900	13.87	48,964	14	1,143	48,756,300	13.39	42,656
More than \$5,000,000.	13	1,915	143,614,900	41.22	74,995	14	1,757	153,947,100	42.28	87,619

Table 7.--Chain Store Gross Margins, Selected Kinds of Business, 1935

Kind of Business	Number of Chains Reporting	(1) Net Chain Sales	Gross Margin	
			Amount	Per Cent of Total Sales
Grocery store chains	38	\$ 24,385,900	\$ 3,897,200	15.98
Combination store chains	35	77,928,200	15,581,300	19.99
Meat market chains (including sea foods)	13	4,217,500	994,500	23.58
Country general store chains	27	7,375,600	1,411,300	19.13
Dry goods store chains	6	2,021,800	568,500	28.12
Variety store chains	14	37,992,100	13,806,900	36.34
Automobile dealer chains	4	9,784,700	1,697,500	17.35
Men's and boys' clothing and furnishings store chains(2)	11	3,994,600	1,294,800	32.41
Family clothing store chains	12	7,839,700	2,174,900	27.74
Women's apparel and accessories store chains(3)	13	4,600,800	1,452,400	31.57
Shoe store chains	24	8,484,800	2,547,800	30.03
Hardware store chains	12	3,842,900	950,500	24.73
Lumber and building material dealer chains	38	11,213,700	2,969,800	26.48
Furniture store chains	8	4,546,300	1,594,400	35.07
Restaurant chains	13	6,620,500	3,381,200	51.07
Drug store chains	29	12,284,300	3,866,500	31.48
Coal and wood yard chains	3	2,574,500	467,900	18.17
Tobacco store chains	11	6,503,900	1,563,500	24.04

(1) In some instances these figures include a small amount of wholesale business in addition to store sales.

(2) Hat and cap store chains and custom tailor chains not included.

(3) Millinery chains not included.

Table 8.--Variety Store Chain Gross Margins, 1935

A. Chains Classified According to Number of Stores.

Size of Chain	Number of Chains	(1) Number of Stores (Average)	Store Sales	Per Cent of Chain Sales	Average Sales Per Store	Gross Margin	
						Per Cent of Total Sales(2)	
			\$		\$	\$	
All Chains, Total	14	377	37,914,000	100.00	100,568	138,069	36.34
Chains having --							
Less than 10 stores	5	33	1,200,000	3.16	36,364	3,752	29.36
10-25 stores	5	79	7,305,900	19.27	92,480	20,879	28.58
More than 25 stores	4	265	29,408,100	77.57	110,974	113,438	38.57

B. Chains Classified According to Total Sales Volume.

All Chains, Total	14	377	\$ 37,914,000	100.00	\$ 100,568	\$ 138,069	36.34
Chains having sales of --							
Less than \$250,000	2	8)	3,751,300	9.89	38,673	11,314	29.55
\$250,000-\$1,000,000	7	89)	34,162,700	90.11	122,010	126,755	37.10
Over \$1,000,000	5	280					

Table 9.--Shoe Store Chain Gross Margins, 1935

A. Chains Classified According to Number of Stores.

All Chains, Total	24	303	\$ 8,447,200	100.00	\$ 27,879	\$ 25,478	30.03
Chains having --							
Less than 6 stores	9	40	1,294,600	15.33	32,365	3,618	27.92
6-10 stores	6	45	1,138,800	13.48	25,307	2,902	25.48
11-25 stores	6	78	2,214,000	26.21	28,385	6,742	30.30
More than 25 stores	3	140	3,799,800	44.98	27,141	12,216	31.94

B. Chains Classified According to Total Sales Volume.

All Chains, Total	24	303	\$ 8,447,200	100.00	\$ 27,879	\$ 25,478	30.03
Chains having sales of --							
Less than \$100,000	2	8)	2,206,200	26.12	22,512	6,016	27.25
\$100,000-\$250,000	13	90)	1,858,200	22.00	37,922	5,735	30.68
\$250,000-\$500,000	5	49	4,382,800	51.88	28,095	13,727	31.14
More than \$500,000	4	156					

(1) The average number of stores was derived from the numbers reported at the beginning, middle and end of the year.

(2) The gross margin percentage is based upon total sales, including store sales and any wholesale sales made direct from warehouses.

Table 10.--Lumber and Building Material Chain Gross Margins, 1935

A. Chains Classified According to Number of Units.

Size of Chain	Number of Chains	Number of Units (Average)	Yard Sales	Per Cent of Chain Sales	Average Sales Per Unit	Gross Margin	
						Amount	Per Cent of Total Sales(2)
All Chains, Total	38	814	11,197,000	100.00	13,756	29,698	26.48
Chains having --							
Less than 6 units	6	27	1,421,000	12.69	52,630	3,296	23.19
6-10 units	10	78	1,065,900	9.52	13,665	2,886	27.08
11-25 units	13	234	2,812,600	25.12	12,020	7,344	26.11
26-50 units	5	161	2,312,100	20.65	14,361	6,388	27.43
More than 50 units	4	314	3,585,400	32.02	11,418	9,784	27.29

B. Chains Classified According to Total Sales Volume.

All Chains, Total	38	814	11,197,000	100.00	13,756	29,698	26.48
Chains having sales of --							
Less than \$100,000	10	63	570,000	5.09	9,048	1,288	22.60
\$100,000-\$250,000	13	190	2,167,200	19.36	11,406	5,991	27.64
\$250,000-\$500,000	9	221	3,170,100	28.31	14,344	8,051	25.40
More than \$500,000	6	340	5,289,700	47.24	15,558	14,368	27.08

(1) The average number of units was derived from the numbers reported at the beginning, middle and end of the year.

(2) The gross margin percentage is based upon total sales, including any wholesale business not passing directly through the retail yards.

Table 11.--Drug Store Chain Gross Margins, 1935

A. Chains Classified According to Number of Stores.

Size of Chain	Number of Chains	(1) Number of Stores (Average)	Store Sales	Per Cent of Chain Sales	Average Sales Per Store	Gross Margin	
		Amount				Per Cent of Total Sales(2)	
All Chains, Total	29	307	12,164,100	100.00	39,622	38,665	31.48
Chains having --							
Less than 6 stores	11	47	1,311,500	10.78	27,904	4,170	31.80
6-10 stores	11	86	2,838,000	23.33	33,000	8,974	30.49
More than 10 stores	7	174	8,014,600	65.89	46,061	25,521	31.78

B. Chains Classified According to Total Sales Volume.

			\$		\$	\$	
All Chains, Total	29	307	12,164,100	100.00	39,622	38,665	31.48
Chains having sales of ---							
Less than \$100,000	5	23	385,400	3.17	16,757	1,163	30.18
\$100,000-\$250,000	13	82	2,261,400	18.59	27,578	6,753	28.53
\$250,000-\$500,000	6	55	1,857,900	15.27	33,780	6,186	33.30
More than \$500,000	5	147	7,659,400	62.97	52,105	24,563	32.01

(1) The average number of stores was derived from the numbers reported at the beginning, middle and end of the year.

(2) The gross margin percentage is based upon total sales, including store sales and any wholesale sales made direct from warehouses.

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