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RETAIL CHAINS

IN

CANADA

1945

OTTAWA
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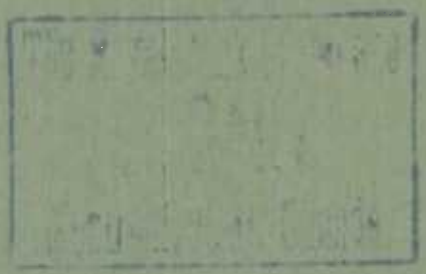

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DEPARTMENT OF TRADE AND COMMERCE
DOMINION BUREAU OF STATISTICS
MERCHANDISING AND SERVICES STATISTICS
OTTAWA, CANADA

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RETAIL CHAINS IN CANADA, 1945

SUMMARY

The annual survey of retail chains in Canada shows 426 such firms operating during the year 1945. These chains companies, which comprise firms operating four or more retail outlets, carried on business through 6,725 stores to the extent of $877,895,900 which represented an increase of 13.4 per cent over the 1944 sales total of $774,088,400. The number of chain companies reporting has been consistently reduced in recent years by the elimination of those chains whose units have diminished to less than four. Nevertheless, chains accounted for an increasing proportion of the total retail trade; their sales formed 18.7 per cent of the total in 1943, 18.8 per cent in 1944, and reached 19.1 per cent in 1945. For the purpose of this survey department stores are not considered as chains, irrespective of the number of units operated.

Salaries and wages paid to store employees increased to $68,414,500 in 1945 from the 1944 total of $62,468,100. Customers' accounts outstanding at the end of the year increased from the reported 1944 figure of $16,445,800 to $17,694,200 in 1945.

The dollar volume of sales has followed a consistent year by year increase since 1933, and since 1941 has shown marked rises each year. Stocks on hand in stores, however, ceased their upward climb, which paralleled sales, in 1941 and remained at a fairly even level through 1945. Stocks on hand in stores were valued at $68,475,200 at the end of 1945 as compared to the 1944 total of $67,615,100. Warehouse stocks moved up from the 1941-1944 level to the high total of $28,850,000, a considerable increase over the 1944 stocks of $21,681,800 and well above the previous high mark of $23,606,500 in 1943.

Chain companies specializing in the sale of food products transact a larger volume of business than do other trades in the chain field. There were 84 such companies operating 1,611 stores in 1945 with sales of $230,042,700, or 26.2 per cent of the total retail chain sales. Included in this group were 23 grocery chains operating 366 grocery stores whose sales amounted to $34,453,600. The bulk of the chain food group is concentrated in the combination store classification. Most of these stores sell both groceries and fresh meats, although some dealing exclusively in groceries are to be found under this heading as a consequence of the classification assigned to the chain company. The 29 combination chains transacted $178,438,000 annual business through 845 outlets. The 10 meat market chains operated 95 units whose sales totalled $6,077,100. These three types of chains, with sales from their 1,306 outlets totalling $218,968,700, accounted for 23.8 per cent of the total estimated sales in 1945 for both chain and independent grocery and combination stores and meat markets.

Variety store chains accounted for 10.9 per cent of the total chain store business, and the 19 companies operated 521 stores whose sales aggregated $95,998,200.

Liquor stores operated by eight Provincial Governments are considered as chain organizations in this survey. In 1945 they operated a total of 536 stores, the sales from which amounted to $211,075,300 and formed 24 per cent of total retail chain sales. In comparison with the experience of other chain stores, they showed the greatest increase in sales over the previous year, the gain being 35.3 per cent.

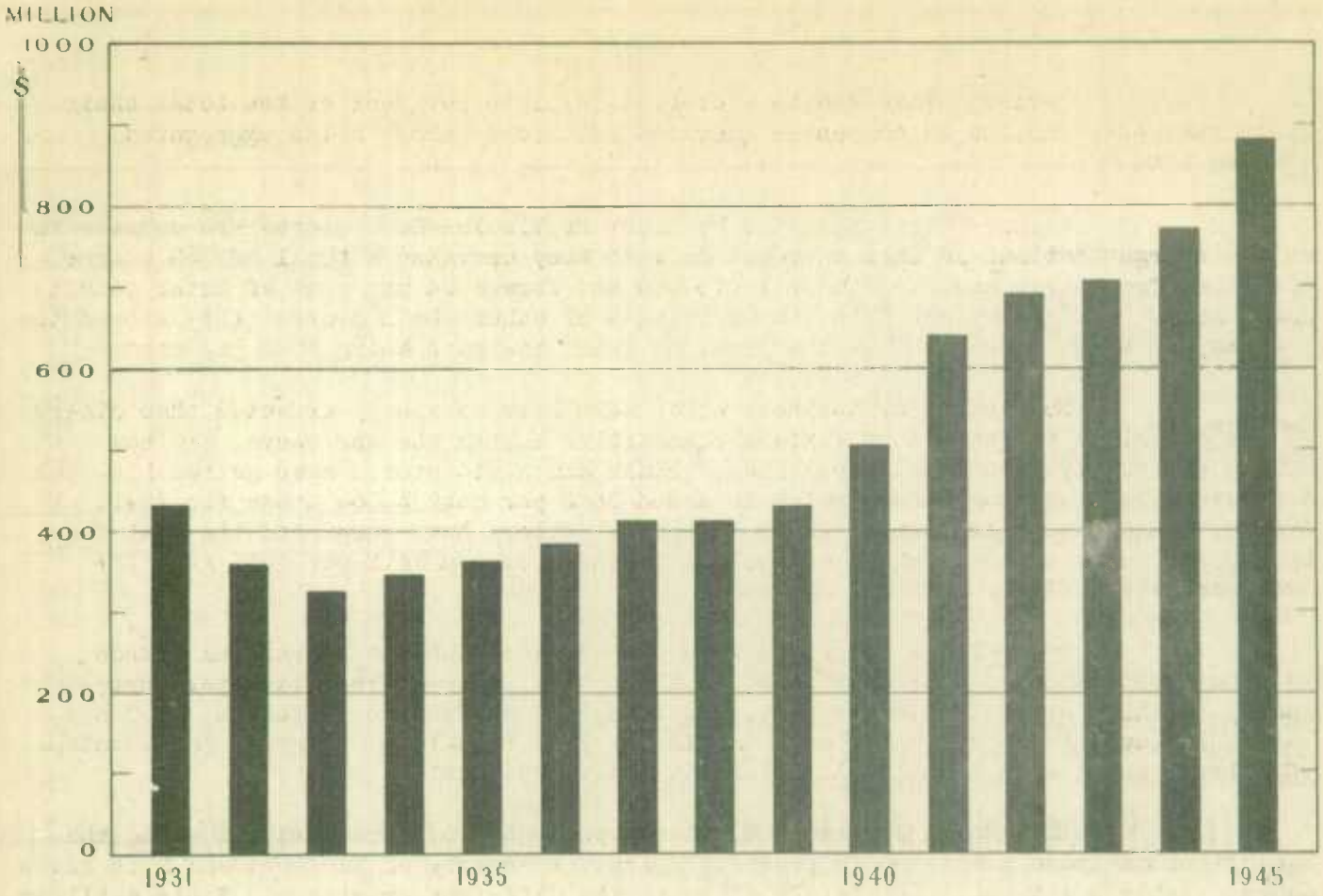
Some kinds of business which were more seriously affected than others by the curtailed production of various commodities during the war years, are now making a recovery. Household appliance, radio and music stores have gained 21.6 per cent over 1944, although their sales remained 38.2 per cent below those for 1941. Office, school and store supplies and equipment dealers have surpassed the 1941 total by 2.8 per cent, a result which came about because of the 14.2 per cent gain for 1945 over 1944 sales.

Other large increases were as follows: tobacco stores and stands, 18.3 per cent; women's apparel stores, 17.2 per cent; shoe stores, 14.9 per cent; family clothing stores, 14.0 per cent, and candy and confectionery stores, 12.3 per cent. Restaurants reported the only decline in 1945 from 1944, although their volume of sales remains at a high level, being 60.4 above 1941 sales.

The tables presented in this report for 1945 are designed along the same lines as those published in previous years. A summary of Tables 1 and 2 is given above. Table 3 sets out the chain picture in the different provinces. Table 4 illustrates the increasing importance of Provincial chains which are each year accounting for an increased ratio of total chain sales, at the expense of Local and National chains.

In Table 5 the increased concentration of chain store business in firms having 100 or more units is apparent. Somewhat the same condition is brought out in Table 6 where the annual volume of business is the basis of classification. In both cases, the general shift into the higher brackets is reflected in the increased percentage ratio in those brackets.

CHAIN STORE SALES, 1931-1945



CHAIN STORE AND WAREHOUSE STOCKS
1934-1945

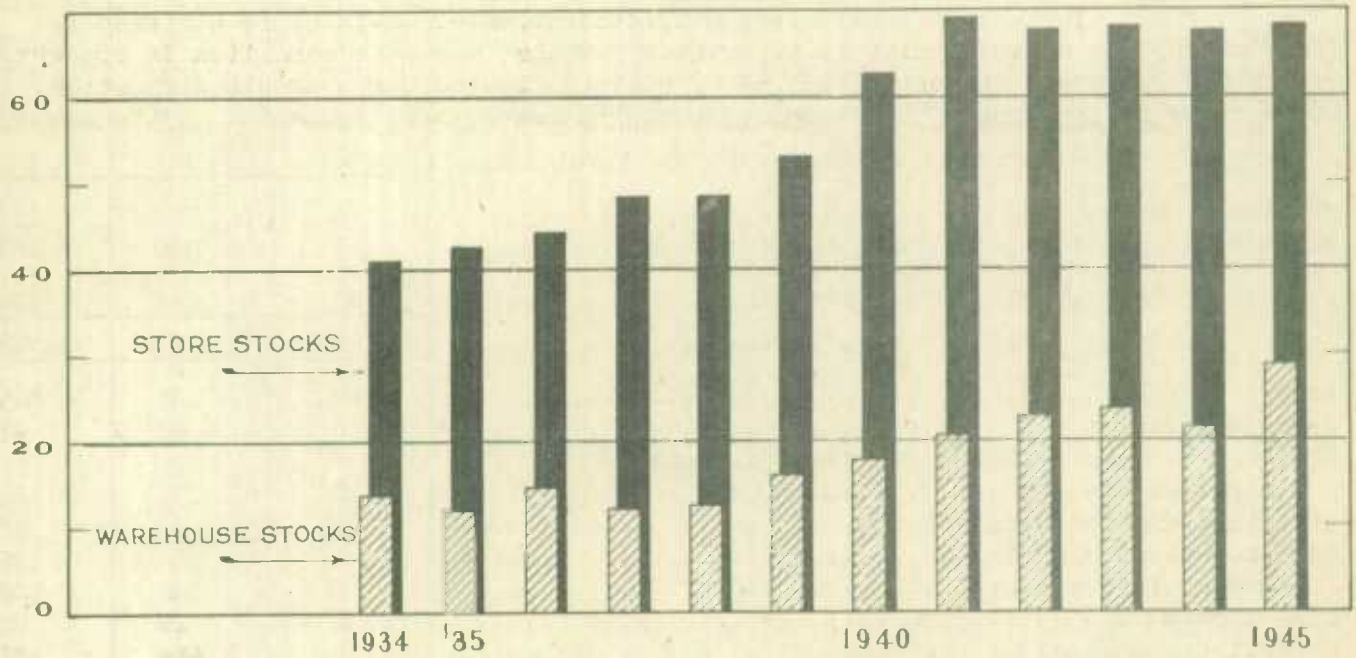


Table 1.--Summary of Retail Chains in Canada, 194[illegible]

Kind of Business	Number of Chains	Number of Stores	
		Average	Maximum
Total, All Chains	426	6,593	6,725
Food Group, Total	84	1,585	1,611
Bakery product dealers	11	109	110
Candy and confectionery stores	9	176	181
Grocery stores	23	358	366
Combination stores	29	836	845
Meat markets	10	92	95
Other food stores	2	14	14
Country General Store Group	19	131	135
General Merchandise Group, Total	33	616	627
Dry goods and general merchandise stores	14	101	106
Variety, 5¢, 10¢, 15c/ to-a-dollar stores	19	515	521
Automotive Group, Total	24	201	217
Motor vehicle dealers	6	34	35
Filling stations	14	133	147
Other automotive accessories stores	4	34	35
Apparel Group, Total	92	948	981
Men's and boys' clothing and furnishings stores	12	114	116
Family clothing stores	17	101	103
Women's apparel and accessories stores	33	289	301
Shoe stores	30	444	461
Building Materials Group, Total	40	775	782
Hardware stores	6	33	33
Lumber and building material dealers	27	679	683
Other building material dealers (inc. paint and glass)	7	63	66
Furniture-Household-Radio Group, Total	33	371	378
Furniture stores	14	125	127
Household appliance, radio and music stores	19	246	251
Restaurant Group, Total	21	246	266
Other Retail Stores, Total	80	1,720	1,728
Drug stores	27	306	309
Jewellery stores	5	44	45
Office store and school furniture equipment and supplies dealers	13	151	151
Opticians and optometrists	4	17	17
Tobacco stores and stands	4	194	199
Government liquor stores	8	535	538
Wine stores	5	29	29
Miscellaneous kinds of business	14	444	440

Table 1.--Summary of Retail Chains in Canada, 1945

Sales (Retail)		Salaries and Wages	Customer's Accounts Outstanding, December 31, 1945	Stocks on hand, December 31, 1945	
Amount	% of total chain sales			Stores	Warehouses
$		$	$	$	$
877,895,900	100.0	68,414,500	17,894,200	68,475,200	28,850,000
230,042,700	26.2	15,421,500	733,800	7,740,100	8,105,100
2,608,600	0.3	332,200	1,000	2,700	40,400
7,269,600	0.8	952,200	10,800	114,200	332,400
34,453,600	3.9	2,245,200	184,000	1,669,700	977,200
178,438,000	20.3	11,227,700	465,800	5,856,400	6,753,600
6,077,100	0.7	599,900	58,800	72,200	1,500
1,195,800	0.2	64,300	13,400	24,900	-
11,204,600	1.3	765,800	665,000	2,210,000	80,200
106,750,500	12.1	12,676,600	332,100	10,486,000	1,787,900
10,752,300	1.2	1,171,400	321,900	1,477,600	31,700
95,998,200	10.9	11,505,200	10,200	9,008,400	1,756,200
12,207,500	1.3	1,387,600	1,196,200	1,159,700	246,300
5,545,100	0.6	521,500	841,800	881,100	-
3,893,700	0.4	454,800	120,300	147,200	246,300
2,768,700	0.3	411,300	234,100	131,400	-
74,438,100	8.5	7,484,900	953,000	10,282,800	2,175,600
11,219,000	1.3	1,193,700	71,400	842,900	209,600
20,018,200	2.3	2,081,100	627,100	3,779,000	386,600
19,456,400	2.2	1,559,300	194,100	1,539,600	396,500
23,744,500	2.7	2,650,800	60,400	4,121,300	1,182,900
46,957,800	5.4	3,462,700	4,002,900	10,434,200	99,200
4,835,700	0.6	500,900	313,600	944,200	10,000
38,813,800	4.4	2,640,200	3,310,400	8,834,600	81,100
3,308,300	0.4	321,600	378,900	655,400	8,100
28,868,000	3.3	3,551,700	3,802,400	5,235,300	1,575,300
17,334,400	2.0	1,750,000	2,665,800	3,281,700	1,357,800
11,533,600	1.3	1,801,700	1,136,600	1,953,600	317,500
20,052,500	2.4	4,739,500	1,000	335,600	290,400
347,314,200	39.5	18,924,200	6,207,800	20,591,500	14,390,000
24,126,500	2.7	3,225,900	103,000	3,083,100	673,400
16,253,400	1.9	1,444,600	1,050,700	2,613,500	39,800
20,750,300	2.4	4,930,800	2,977,000	2,116,900	46,800
249,400	(a)	83,100	13,200	35,900	-
12,792,900	1.5	1,054,800	84,400	1,009,900	353,500
211,075,300	24.0	4,895,900	10,800	5,302,100	11,872,900
2,159,300	0.2	186,000	99,300	185,300	215,700
59,907,100	6.8	3,103,100	1,869,400	6,244,800	1,187,900

(a) Less than 0.05 per cent.

Table 2.--Principal Statistics of Retail Chains for Selected Kinds of Business, 1941 - 1945

Kind of Business	1941	1943	1944	1945
Total, All Chains --				
Chains (number)	533	448	435	426
Stores (maximum)	8,014	7,074	6,829	6,725
Chain sales $	642,731,700	708,249,100	(1)774,088,400	877,895,900
Index of chain sales (1941=100)	100.0	110.2	120.5	136.6
Candy and confectionery stores --				
Chains (number)	8	8	8	9
Stores (maximum)	194	180	173	181
Chain sales $	4,374,500	5,978,300	6,473,800	7,269,600
Index of chain sales (1941=100)	100.0	136.7	148.0	166.2
Grocery and combination stores --				
Chains (number)	62	56	55	52
Stores (maximum)	1,541	1,269	1,245	1,211
Chain sales $	172,317,400	179,833,500	198,811,100	212,891,600
Index of chain sales (1941=100)	100.0	104.4	115.4	123.5
Meat markets --				
Chains (number)	17	13	12	10
Stores (maximum)	166	125	119	95
Chain sales $	5,088,500	6,141,100	6,041,400	6,077,100
Index of chain sales (1941=100)	100.0	120.7	118.7	119.4
Variety stores --				
Chains (number)	20	19	18	19
Stores (maximum)	532	521	515	521
Chain sales $	74,179,100	84,366,200	88,568,800	95,998,200
Index of chain sales (1941=100)	100.0	113.7	119.4	129.4
Men's and boys' clothing and furnishings stores (including custom tailors) --				
Chains (number)	18	15	12	12
Stores (maximum)	147	132	117	116
Chain sales $	9,498,700	10,030,500	10,377,000	11,219,000
Index of chain sales (1941=100)	100.0	105.6	109.2	118.1
Family clothing stores --				
Chains (number)	19	17	17	17
Stores (maximum)	115	100	99	103
Chain sales $	13,943,500	16,513,000	17,560,900	20,018,200
Index of chain sales (1941=100)	100.0	118.4	125.9	143.6
Women's apparel and accessories stores --				
Chains (number)	38	31	32	33
Stores (maximum)	318	277	293	301
Chain sales $	12,438,300	15,134,400	16,607,700	19,456,400
Index of chain sales (1941=100)	100.0	121.7	133.5	156.4
Shoe stores --				
Chains (number)	35	29	29	30
Stores (maximum)	452	426	432	461
Chain sales $	16,312,600	19,647,700	20,663,900	23,744,500
Index of chain sales (1941=100)	100.0	120.4	126.7	145.6

(1) Revised.

Table 2.--Principal Statistics of Retail Chains for Selected Kinds of Business, 1941 - 1945

Kind of Business	1941	1943	1944	1945
Hardware stores --				
Chains (number)	7	7	7	6
Stores (maximum)	38	37	39	33
Chain sales $	3,849,700	4,210,700	4,614,900	4,835,700
Index of chain sales (1941=100)	100.0	109.4	119.8	125.6
Lumber and building material dealers --				
Chains (number)	31	30	29	27
Stores (maximum)	738	700	700	683
Chain sales $	21,868,400	30,522,400	37,124,300	38,813,800
Index of chain sales (1941=100)	100.0	139.4	169.6	177.3
Furniture stores --				
Chains (number)	16	13	14	14
Stores (maximum)	127	120	127	127
Chain sales $	15,484,200	13,674,800	15,650,800	17,334,400
Index of chain sales (1941=100)	100.0	88.3	101.1	111.9
Household appliance, radio and music stores --				
Chains (number)	27	19	20	19
Stores (maximum)	410	284	257	251
Chain sales $	18,655,600	9,773,900	9,482,200	11,533,600
Index of chain sales (1941=100)	100.0	52.4	50.8	61.8
Restaurants --				
Chains (number)	28	24	22	21
Stores (maximum)	264	264	258	266
Chain sales $	12,498,400	19,493,700	20,336,700	20,052,500
Index of chain sales (1941=100)	100.0	156.0	162.7	160.4
Drug stores --				
Chains (number)	35	31	29	27
Stores (maximum)	363	334	323	309
Chain sales $	18,944,500	21,511,600	23,004,500	24,126,500
Index of chain sales (1941=100)	100.0	113.6	121.4	127.4
Office, school and store supplies and equipment dealers --				
Chains (number)	13	13	13	13
Stores (maximum)	147	148	150	151
Chain sales $	20,192,600	17,767,300	(1) 18,166,500	20,750,300
Index of chain sales (1941=100)	100.0	88.0	90.0	102.8
Tobacco stores and stands --				
Chains (number)	6	4	4	4
Stores (maximum)	217	197	199	199
Chain sales $	7,185,800	9,810,000	10,818,300	12,792,900
Index of chain sales (1941=100)	100.0	136.5	150.6	178.0
Liquor stores --				
Chains (number)	9	8	8	8
Stores (maximum)	615	534	536	538
Chain sales $	112,397,800	148,178,900	155,980,300	211,075,300
Index of chain sales (1941=100)	100.0	131.8	138.8	187.8

(1) Revised.

Table 3.--Principal Statistics of Retail Chains by Provinces, 1941 - 1945

	1941	1943	1944 (1)	1945
Canada Total, All Chains --				
Chains (number)	533	448	435	426
Stores (maximum)	8,014	7,074	6,829	6,725
Chain sales $	642,731,700	708,249,100	774,088,400	877,895,900
Index of chain sales (1941=100)	100.0	110.2	120.5	136.6
Northwest Territories and the Yukon --				
Chains (number)	5	4	5	4
Stores (maximum)	62	55	57	56
Chain sales $	1,493,600	2,590,400	3,306,200	3,077,800
Index of chain sales (1941=100)	100.0	173.4	221.4	206.1
British Columbia --				
Chains (number)	91	73	77	79
Stores (maximum)	765	663	666	663
Chain sales $	63,925,100	70,684,900	79,733,400	91,514,200
Index of chain sales (1941=100)	100.0	110.6	124.7	143.2
Alberta --				
Chains (number)	89	76	75	73
Stores (maximum)	578	518	504	497
Chain sales $	36,110,600	46,989,500	51,347,400	57,674,700
Index of chain sales (1941=100)	100.0	130.1	142.2	159.7
Saskatchewan --				
Chains (number)	78	65	61	62
Stores (maximum)	882	709	701	687
Chain sales $	32,523,600	38,026,200	43,697,700	49,703,000
Index of chain sales (1941=100)	100.0	116.9	134.4	152.8
Manitoba --				
Chains (number)	69	60	60	63
Stores (maximum)	335	284	277	279
Chain sales $	27,437,500	32,336,000	36,573,500	42,496,600
Index of chain sales (1941=100)	100.0	117.9	133.3	154.9

(1) In some instances figures for 1944 have been revised.

Table 3.--Principal Statistics of Retail Chains by Provinces, 1941 - 1945

	1941	1943	1944 (1)	1945
Ontario --				
Chains (number)	284	249	241	227
Stores (maximum)	3,389	3,077	2,921	2,838
Chain sales $	295,823,000	310,227,600	336,041,500	384,405,300
Index of chain sales (1941=100)	100.0	104.9	113.6	129.9
Quebec --				
Chains (number)	165	140	135	141
Stores (maximum)	1,443	1,264	1,234	1,231
Chain sales $	132,325,000	146,584,700	156,297,800	175,826,600
Index of chain sales (1941=100)	100.0	110.8	118.1	132.9
New Brunswick --				
Chains (number)	48	44	39	40
Stores (maximum)	217	206	178	184
Chain sales $	19,827,600	22,008,500	24,169,300	27,543,000
Index of chain sales (1941=100)	100.0	111.0	121.9	138.9
Nova Scotia --				
Chains (number)	57	49	48	49
Stores (maximum)	326	283	277	276
Chain sales $	32,237,700	38,044,600	42,125,800	44,697,600
Index of chain sales (1941=100)	100.0	118.0	130.7	138.7
Prince Edward Island --				
Chains (number)	10	10	9	9
Stores (maximum)	17	15	14	14
Chain sales $	1,028,000	756,700	795,800	957,100
Index of chain sales (1941=100)	100.0	73.6	77.4	93.1

(1) In some instances figures for 1944 have been revised.

Table 4.--Retail Chains Classified According to Type of Operation, 1941 - 1945

Type of Operation	Number of Chains	Number of Stores	Chain Sales		
			Amount	Per cent of total	Average per store
	1941				
			$		$
Total, All Chains	533	8,014	642,731,700	100.0	80,200
Local chains	176	1,092	60,888,300	9.5	55,800
Provincial chains	234	3,160	287,495,000	44.7	91,000
Sectional and National chains	123	3,762	294,348,400	45.8	78,200
	1943				
			$		$
Total, All Chains	448	7,074	708,249,100	100.0	100,100
Local chains	145	915	65,054,300	9.2	71,100
Provincial chains	196	2,822	329,453,500	46.5	116,700
Sectional and National chains	107	3,337	313,741,300	44.3	94,000
	1944				
			$		$
Total, All Chains	435	6,829	(1)774,088,400	100.0	(1)113,400
Local chains	139	879	65,172,600	8.4	74,100
Provincial chains	195	2,834	371,857,900	48.1	131,200
Sectional and National chains	101	3,116	(1)337,057,900	43.5	(1)108,200
	1945				
			$		$
Total, All Chains	426	6,725	877,895,900	100.0	130,500
Local chains	131	857	70,342,300	8.0	82,100
Provincial chains	192	2,767	443,585,100	50.5	160,300
Sectional and National chains	103	3,101	363,968,500	41.5	117,400

(1) Revised.

Table 5.--Retail Chains Classified According to Number of Units Operated, 1941 - 1945

	Number of Chains	Number of Stores	Chain Sales		
			Amount	Per cent of total	Average per store
			1941		
Total, All Chains	533	8,014	$642,731,700	100.0	$80,200
Less than 6 units	223	968	71,938,200	11.2	74,300
6-10 units	166	1,261	80,730,000	12.6	64,000
11-25 units	79	1,281	82,459,200	12.8	64,400
26-50 units	36	1,272	80,859,700	12.6	63,600
51-100 units	16	1,155	77,879,500	12.1	67,400
100 or more units	13	2,077	248,885,100	38.7	119,800
			1943		
Total, All Chains	448	7,074	$708,249,100	100.0	$100,100
Less than 6 units	169	745	58,865,100	8.3	79,000
6-10 units	141	1,072	79,494,600	11.2	74,200
11-25 units	77	1,259	102,841,000	14.6	81,700
26-50 units	32	1,109	90,699,200	12.8	81,800
51-100 units	18	1,275	97,355,000	13.7	76,400
100 or more units	11	1,614	278,994,200	39.4	172,900
			1944		
Total, All Chains	435	6,829	$(1)774,088,400	100.0	$(1)113,400
Less than 6 units	162	716	62,954,000	8.1	87,900
6-10 units	137	1,028	79,359,000	10.3	77,200
11-25 units	78	1,290	108,332,200	14.0	84,000
26-50 units	30	975	(1)101,617,800	13.1	(1)104,200
51-100 units	17	1,184	108,785,800	14.1	91,900
100 or more units	11	1,636	313,039,600	40.4	191,300
			1945		
Total, All Chains	426	6,725	$677,895,900	100.0	$130,500
Less than 6 units	158	691	62,286,800	7.0	90,100
6-10 units	136	1,017	94,488,700	10.8	92,900
11-25 units	76	1,267	124,341,700	14.2	98,100
26-50 units	29	999	115,817,800	13.2	115,900
51-100 units	16	1,136	121,307,100	13.8	106,800
100 or more units	11	1,615	359,653,800	41.0	222,700

(1) Revised.

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Table 6.--Retail Chains Classified According to Amount of Annual Retail Sales, 1941 - 1945

Annual Sales Volume of Chain	Number of Chains	Number of Stores	Chain Sales		
			Amount	Per cent of total	Average per store
			1941		
Total, All Chains	533	8,014	$642,731,700	100.0	$80,200
Under $100,000	83	447	5,588,800	0.8	12,500
$100,000 - $199,999	104	607	15,290,900	2.4	25,200
$200,000 - $499,999	160	1,287	50,556,300	7.9	39,300
$500,000 - $999,999	84	1,022	60,805,700	9.5	59,500
$1,000,000 - $4,999,999	79	2,405	159,941,600	24.9	66,500
$5,000,000 and over	23	2,246	350,548,400	54.5	156,100
			1943		
Total, All Chains	448	7,074	$708,249,100	100.0	$100,100
Under $100,000	42	248	2,821,200	0.4	11,400
$100,000 - $199,999	84	535	12,568,500	1.8	23,500
$200,000 - $499,999	134	989	43,557,600	6.2	44,000
$500,000 - $999,999	75	929	55,516,200	7.8	59,800
$1,000,000 - $4,999,999	88	2,129	171,308,300	24.2	80,500
$5,000,000 and over	25	2,244	422,477,300	59.6	188,300
			1944 (1)		
Total, All Chains	435	6,829	$774,088,400	100.0	$113,400
Under $100,000	34	192	2,461,400	0.3	11,200
$100,000 - $199,999	77	510	11,517,400	1.5	22,600
$200,000 - $499,999	126	845	40,658,500	5.3	48,200
$500,000 - $999,999	74	727	53,611,300	6.9	73,700
$1,000,000 - $4,999,999	98	2,262	192,332,900	24.8	85,100
$5,000,000 and over	26	2,293	473,506,900	61.2	206,500
			1945		
Total, All Chains	426	6,725	$877,895,900	100.0	$130,500
Under $100,000	25	146	1,612,000	0.2	11,000
$100,000 - $199,999	63	382	9,471,800	1.1	24,800
$200,000 - $499,999	130	831	43,062,900	4.9	51,800
$500,000 - $999,999	73	655	51,646,800	5.9	78,900
$1,000,000 - $4,999,999	108	2,370	212,703,200	24.2	89,700
$5,000,000 and over	27	2,341	559,399,200	63.7	239,000

(1) In some instances figures for 1944 have been revised.