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DEPARTMENT OF TRADE AND COMMERCE

DOMINION BUREAU OF STATISTICS

MERCHANDISING AND SERVICES STATISTICS

RETAIL CHAINS

IN

CANADA

1946



OTTAWA

January 1948

Price 25 cents

Retail Chain Stores, 1946

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Definitions

Chains

For the purpose of this survey, a retail chain is an organization operating four or more retail stores under the same ownership.

Chain Classification 1-Kind of Business

A chain is classified according to the kind of business carried on by the majority of its stores. Due to this broader classification, some chains may operate a store of a type different from the chain as a whole. In a few instances where a chain operated several stores of two distinct types, separate reports were submitted and each type tabulated in its proper classification.

2. Type of Organization

Local chains are those operated within one city or locality. Provincial, as the name implies, are those confined to one province yet broader in field of operation than the local chains. Sectional chains cover more than one province, yet are confined to a region such as the Maritimes or Prairies while national chains operate stores in most if not all provinces.

Stores - average

The average number of stores operated is obtained by averaging the number in operation at January 1st, June 30 and December 31st.

- Maximum

The maximum number is the total number of stores operated throughout the year, whether continuous or part year.

Sales

Net retail sales are gross sales less any returns and allowances. Sales at wholesale are not included.

Salaries and Wages

Salaries and wages shown in this report are those paid to store employees only, as comparable to store sales. Salaries and wages paid to head office and warehouse employees are not included.

Accounts Outstanding

This represents the amounts owing on charge, instalment or open accounts at the end of the year. It does not include accounts written off.

Stocks

The inventory of stocks on hand at the end of the year in both stores and warehouses is at cost or invoice value.

DOMINION BUREAU OF STATISTICS

MERCHANDISING AND SERVICES STATISTICS

OTTAWA

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Retail Chains in Canada, 1946

Introduction

The Dominion Bureau of Statistics conducts an annual survey on the operation of retail chains. Information is obtained and results tabulated by kind of business on the number of stores operated, net retail sales, salaries and wages paid to store employees, accounts outstanding and store and warehouse inventories at the end of the year. Reports are received from all known firms coming within the definition of a chain, giving this study complete coverage.

Separate reports have been published on Food Chains, Variety Chains and Drug Chains, 1946 showing more detail than presented in this bulletin. Department stores which might be considered as belonging to the chain field are not included.

SUMMARY

1. Stores and Sales 1946

Although there were 7 fewer chains in 1946 than in 1945, the number of stores operated increased by 40 and the dollar volume of retail sales exceeded that for the previous year by 16 per cent. The gain in sales was stimulated particularly by a greater supply of durable goods, noticeable in the sales of furniture stores, household appliance and radio dealers, office, school and store equipment dealers and hardware stores.

2. Comparison with Previous Years

Table 1 depicts the growth of retail chain stores since 1930, the first year in which the survey was conducted. The overall period shows that number of stores in operation fell from 8,504 in 1930 to 6,823 in 1946 but sales increased from \$487,336,000 to \$1,022,419,800. The average sales per store had almost quadrupled in 1946 from the low 1933 figure of \$41,633. Salaries and wages paid to store employees did not keep pace with the rate of sales increase. Accounts outstanding, which had reached their lowest level during the war years, registered a significant increase in 1946, due in part no doubt, to a greater volume of durable goods as reflected in the greater sales of furniture and appliances. Both store and warehouse stocks were greater in

dollar volume at the end of 1946 than at any previous year-end, the gains over 1945 being 28 per cent and 31 per cent respectively.

3. Provincial Comparison

All regions of the country shared in the general increase in dollar volume of sales during 1946, ranging from a gain of 11.7 per cent in Alberta to one of 36.7 per cent in the Northwest Territories and the Yukon. A significant increase was noted in New Brunswick sales. Although there were six fewer stores, than in 1945, dollar volume of business rose by 35.1 per cent. (See table 4, page 12.)

4. Chains Classed by Type

In 1946 little change took place in distribution of sales over the different types of chain organizations. Provincial chains lost a small share of their 1945 ratio to sectional and national chains, but still accounted for approximately half of the business transacted by all retail chains. (See table 5, page 13.)

5. Chains Classified by Number of Units

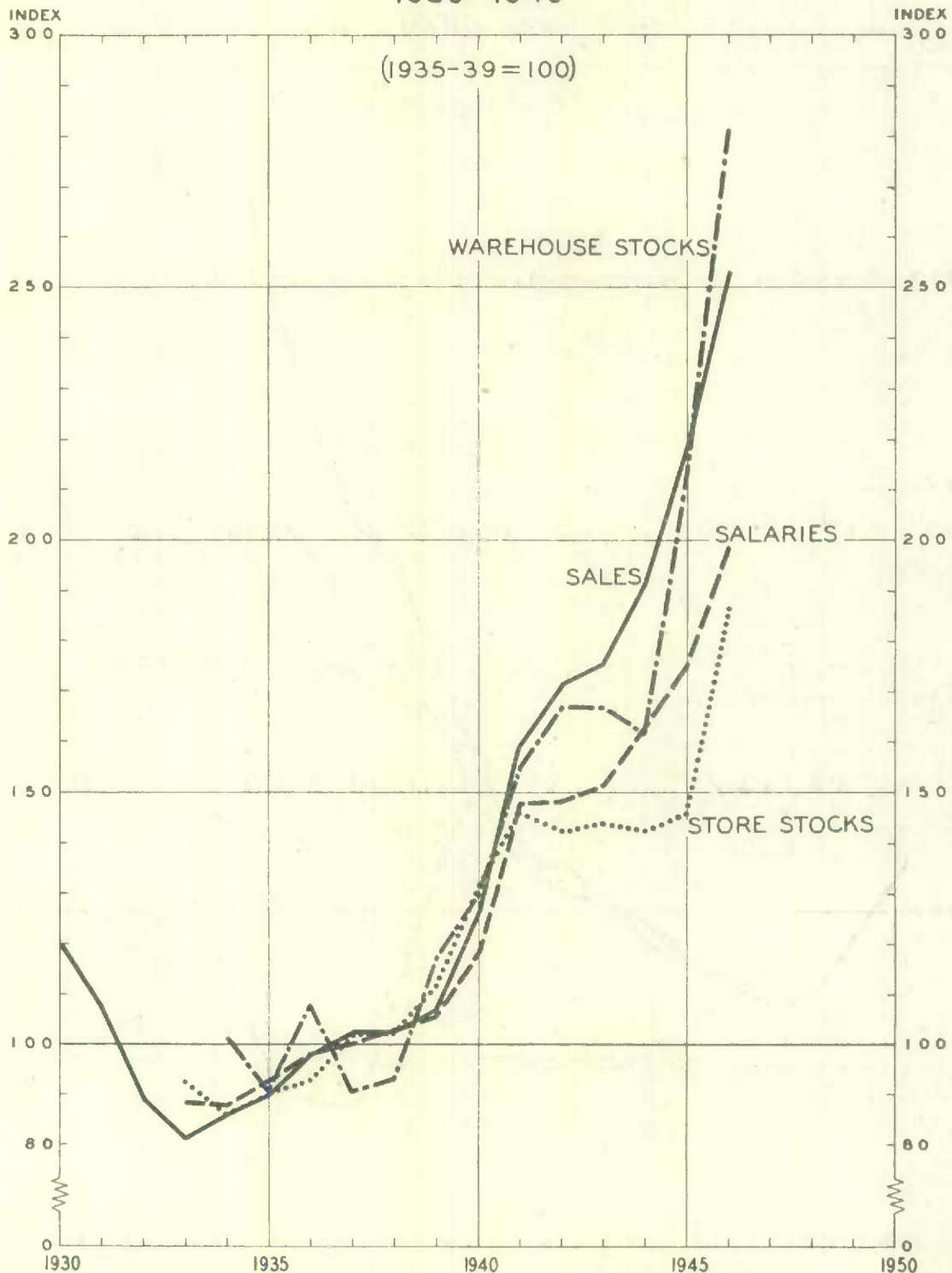
In 1946 there was a reduction in the number of chains operating fewer than 6 units, which resulted from the upward movement to the next larger volume of business size and by the removal of firms from the survey when the number of stores operated became less than 4. Other unit groups changed only slightly from 1945 in both number of stores operated and proportion of total sales. (See table 6, page 14.)

6. Chains Classified by Amount of Annual Sales

Chains doing \$5,000,000 of business and over continued their proportionate increase of total sales in 1946. Since 1941 their share of chain sales has been extended from 54.5 per cent to 64.2 per cent. This increase substantiates the trend of larger averages in store sales. The three smallest size groups were lessened in both number of chains and sales, thereby compensating for the increases in the larger groups. (See table 7, page 15.)

RETAIL CHAINS IN CANADA TOTAL SALES, SALARIES, STORE AND WAREHOUSE STOCKS

1930-1946



RETAIL CHAINS IN CANADA AVERAGE SALES, SALARIES, STOCKS AND ACCOUNTS OUTSTANDING PER STORE 1930-1946

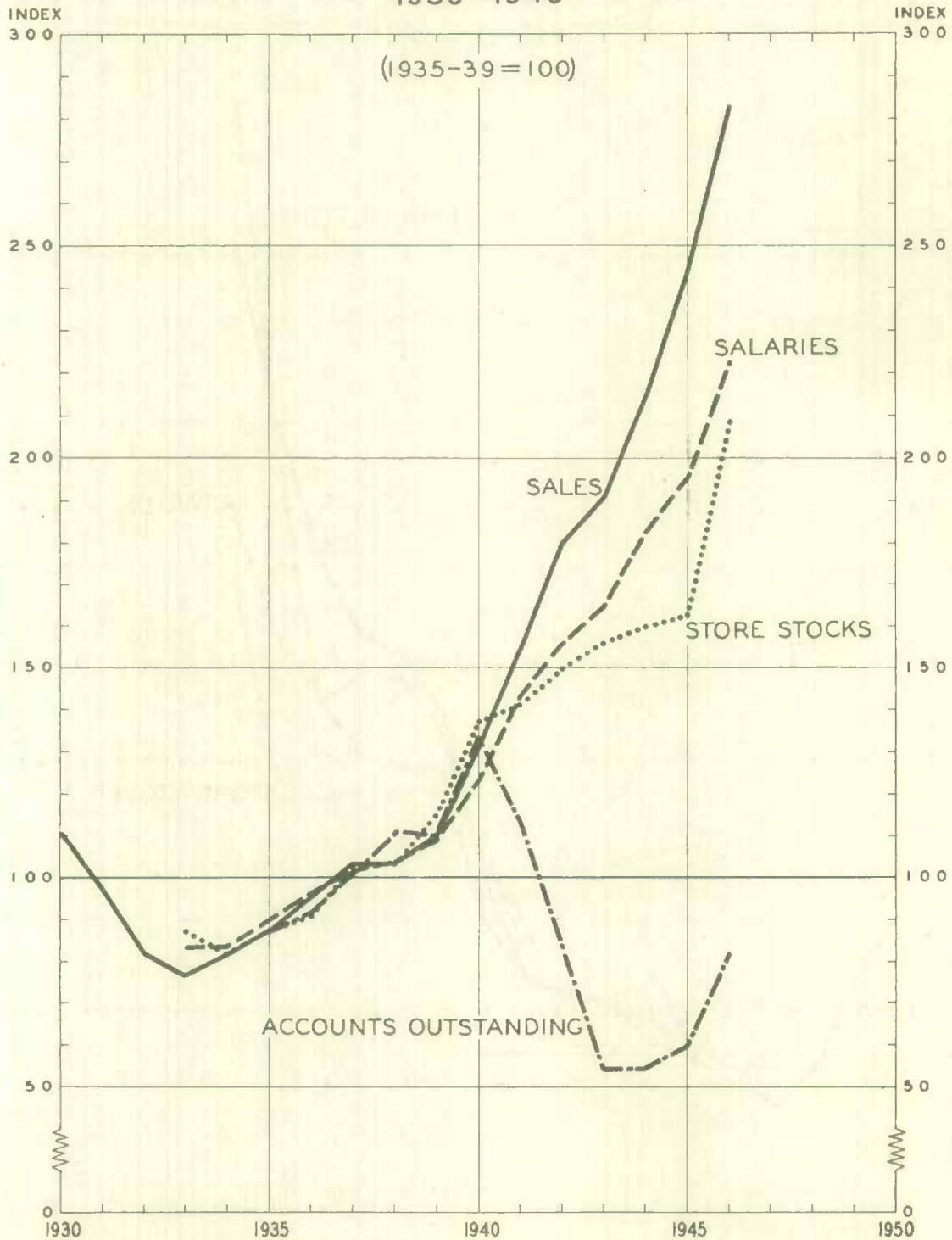


Table 1.--Summary of Retail Chains in Canada, 1930 - 1946

Year	Number of Chains	Stores		Retail Sales	Average Sales Per Store	Salaries and Wages Paid to Store Employees	Accounts Outstanding	Stocks on Hand End of Year	
		Average(1)	Maximum					Stores	Warehouses
				\$	\$	\$	\$	\$	\$
1930 .	518	8,097	8,504	487,336,000	60,187	50,404,900	(a)	60,457,200	(a)
1931 .	506	8,188	8,557	434,199,700	53,029	(a)	(a)	(a)	(a)
1932 .	486	8,066	8,398	360,806,200	44,732	(a)	(a)	(a)	(a)
1933 .	461	7,900	8,230	328,902,600	41,633	34,820,600	(a)	43,995,100	(a)
1934 .	445	7,804	8,210	347,186,100	44,488	34,510,900	(a)	40,962,600	13,768,100
1935 .	445	7,666	8,022	364,129,800	47,499	36,382,000	30,188,700	42,796,200	12,265,900
1936 .	457	7,588	8,124	394,935,000	52,047	38,603,000	31,430,400	44,258,000	14,631,500
1937 .	447	7,346	7,815	414,133,300	56,375	39,289,500	33,526,200	48,550,700	12,280,000
1938 .	457	7,356	7,692	414,448,300	56,342	40,368,400	37,073,700	48,617,300	12,623,200
1939 .	446	7,215	7,595	432,026,100	59,879	41,427,800	35,942,800	53,167,700	15,915,600
1940 .	451	7,131	7,522	508,553,900	71,316	46,462,300	43,229,700	62,634,500	17,621,700
1941 .	533	7,667	8,014	642,731,700	83,831	58,097,000	39,538,400	69,295,000	20,975,600
1942 .	459	7,062	7,193	692,188,700	98,016	58,189,400	(a)	67,702,000	22,633,400
1943 .	448	6,833	7,074	708,249,100	103,651	59,413,400	16,694,800	68,284,800	22,602,500
1944 .	435	6,614	6,829	774,088,400	117,038	63,840,500	16,231,200	67,615,100	21,854,900
1945 .	435	6,650	6,783	881,368,000	132,537	68,721,300	17,971,500	69,152,200	29,013,100
1946 .	428	6,635	6,823	1,022,419,800	154,095	78,041,400	21,633,200	88,514,500	38,136,400

(1) Obtained by averaging the number at the beginning, middle and end of year.

(a) Not available.

Table 2.--Principal Statistics of Retail Chains in Canada, 1946
by Kinds of Business

Kind of Business	Number of Chains	Number of Stores	
		Average	Maximum
Total, All Chains	428	6,635	6,823
Food Group, Total	88	1,575	1,610
Bakery product dealers	11	109	114
Candy and confectionery stores	9	184	187
Grocery stores	23	334	339
Combination stores	29	820	838
Meat markets	13	108	112
Other food stores	3	20	20
Country General Store Group	20	140	143
General Merchandise Group, Total	32	615	624
✓ Dry goods and general merchandise stores	13	100	101
Variety, 5-10-15¢ to-a-dollar stores	19	515	523
Automotive Group, Total	19	162	180
Motor vehicle dealers	5	31	31
Filling stations	10	97	113
Other automotive accessories stores	4	34	36
Apparel Group, Total	93	979	1,018
✓ Men's and boys' clothing and furnishings stores	12	114	115
Family clothing stores	16	95	97
✓ Women's apparel and accessories stores	35	307	325
Shoe stores	30	463	481
Building Materials Group, Total	41	798	812
✓ Hardware stores	6	33	33
Lumber and building material dealers	27	686	697
Paint, varnish and wallpaper stores	8	79	82
Furniture-Household-Radio Group, Total	34	381	390
✓ Furniture stores	15	131	131
✓ Household appliance, radio and music stores	19	250	259
Restaurant Group, Total	22	251	277
Other Retail Stores, Total	79	1,734	1,769
✓ Drug stores	27	310	318
✓ Jewellery stores	4	40	43
Office store and school furniture equipment and supplies dealers	13	154	156
Opticians and optometrists	3	13	13
Tobacco stores	4	196	201
Government liquor stores	8	540	545
Wine stores	5	29	29
Miscellaneous kinds of business	15	452	464

Table 2.--Principal Statistics of Retail Chains in Canada, 1946
by Kinds of Business

Sales (Retail)		Salaries and wages	Customer's Accounts Outstanding, December 31, 1946	Stocks on hand, December 31, 1946	
Amount	% of total chain sales			Stores	Warehouses
\$		\$	\$	\$	\$
1,022,419,800	100.0	78,041,400	21,633,200	88,514,500	38,136,400
258,578,700	25.3	17,636,600	789,800	9,136,000	10,219,000
3,274,000	0.3	376,700	5,500	2,200	12,400
8,633,100	0.9	1,036,300	3,000	82,600	274,900
37,018,200	3.6	2,469,500	188,500	1,956,200	1,006,200
200,659,100	19.6	12,870,500	509,600	6,946,400	8,655,100
7,600,800	0.8	768,800	66,600	115,000	44,000
1,393,500	0.1	114,800	16,600	33,600	226,400
14,144,700	1.4	972,700	857,500	3,121,400	46,200
119,581,600	11.7	13,992,900	417,000	12,909,800	2,422,700
11,995,400	1.2	1,247,400	414,900	1,925,700	78,400
107,586,200	10.5	12,745,500	2,100	10,984,100	2,344,300
16,828,500	1.6	1,692,400	1,379,000	2,004,900	61,000
9,225,600	0.9	765,500	1,016,600	1,560,700	-
4,397,200	0.4	466,900	90,200	125,800	61,000
3,205,700	0.3	460,000	272,200	318,400	-
85,789,600	8.4	8,248,900	1,314,300	12,718,300	3,121,300
13,036,500	1.3	1,306,300	87,500	1,485,300	116,500
23,570,200	2.3	2,297,700	975,900	3,557,000	537,300
23,076,000	2.3	1,803,700	219,300	2,613,800	902,900
26,106,900	2.5	2,841,200	31,600	5,062,200	1,564,600
58,032,900	5.7	3,976,300	4,384,600	11,976,900	97,500
5,821,600	0.6	560,600	357,000	1,147,500	2,900
47,565,300	4.6	2,971,900	3,630,600	9,772,900	74,800
4,646,000	0.5	443,800	397,000	1,056,500	19,800
39,205,300	3.8	4,064,000	4,128,300	8,798,600	2,851,200
22,245,400	2.2	1,880,700	2,802,900	6,027,700	2,462,200
16,959,900	1.6	2,183,300	1,325,400	2,770,900	389,000
21,579,300	2.1	5,162,000	1,000	329,200	421,200
408,679,200	40.0	22,295,600	8,361,700	27,519,400	18,896,300
26,483,700	2.6	3,620,300	140,800	3,553,200	751,800
18,708,600	1.8	1,794,500	1,384,800	3,783,700	11,900
27,443,600	2.7	6,580,300	4,496,500	2,748,000	175,200
201,200	(1)	73,400	8,800	28,000	-
14,219,600	1.4	1,162,800	101,300	1,100,200	341,700
249,022,800	24.4	5,417,100	11,500	9,461,300	15,598,000
3,058,400	0.3	229,000	34,600	317,900	246,300
69,541,300	6.8	3,418,200	2,183,400	6,527,100	1,771,400

(1) Less than 0.05 per cent.

Table 3.--Chains, Stores and Sales for Selected Kinds of Business, 1941, 1944 - 1946

Kind of Business	1941	1944	1945(1)	1946
Total, All Chains --				
Chains (number)	533	435	435	428
Stores (maximum)	8,014	6,829	6,783	6,823
Chain sales	\$ 642,731,700	774,088,400	881,368,000	1,022,419,800
Candy and confectionery stores --				
Chains (number)	8	8	9	9
Stores (maximum)	194	173	181	187
Chain sales	\$ 4,374,500	6,473,800	7,269,600	8,633,100
Grocery and combination stores --				
Chains	62	55	54	52
Stores (maximum)	1,541	1,245	1,219	1,177
Chain sales	\$ 172,317,400	198,811,100	213,670,500	237,677,300
Meat markets --				
Chains (number)	17	12	12	13
Stores (maximum)	166	119	103	112
Chain sales	\$ 5,088,500	6,041,400	6,614,800	7,600,800
Variety stores --				
Chains (number)	20	18	19	19
Stores (maximum)	532	515	521	523
Chain sales	\$ 74,179,100	88,568,800	95,998,200	107,586,200
Men's and boys' clothing and furnishings stores (including custom tailors) --				
Chains (number)	18	12	12	12
Stores (maximum)	147	117	116	115
Chain sales	\$ 9,498,700	10,377,000	11,219,000	13,036,500
Family clothing stores --				
Chains (number)	19	17	17	16
Stores (maximum)	115	99	103	97
Chain sales	\$ 13,943,500	17,560,900	20,018,200	23,570,200
Women's apparel and accessories stores --				
Chains (number)	38	32	33	35
Stores (maximum)	318	293	301	325
Chain sales	\$ 12,438,300	16,607,700	19,456,400	23,076,000
Shoe stores --				
Chains (number)	35	29	30	30
Stores (maximum)	452	432	461	481
Chain sales	\$ 16,312,600	20,663,900	23,744,500	26,106,900

(1) In some instances figures for 1945 have been revised.

Table 3.--Chains, Stores and Sales for Selected Kinds
of Business, 1941, 1944 - 1946

Kind of Business	1941	1944	1945(1)	1946
Hardware stores --				
Chains (number)	7	7	6	6
Stores (maximum)	38	39	33	33
Chain sales \$	3,849,700	4,614,900	4,835,700	5,821,600
Lumber and building material dealers --				
Chains (number)	31	29	28	27
Stores (maximum)	738	700	686	697
Chain sales	21,888,400	37,124,300	39,107,000	47,565,300
Furniture stores --				
Chains (number)	16	14	15	15
Stores (maximum)	127	127	131	131
Chain sales \$	15,484,200	15,650,800	17,633,200	22,245,400
Household appliance, radio and music stores --				
Chains (number)	27	20	19	19
Stores (maximum)	410	257	251	259
Chain sales \$	18,655,600	9,482,200	11,533,600	16,959,900
Restaurants --				
Chains (number)	28	22	21	22
Stores (maximum)	264	258	266	277
Chain sales \$	12,498,400	20,336,700	20,052,500	21,579,300
Drug stores --				
Chains (number)	35	29	27	27
Stores (maximum)	363	323	309	318
Chain sales \$	18,944,500	23,004,500	24,126,300	26,483,700
Office, school and store supplies and equipment dealers --				
Chains (number)	13	13	13	13
Stores (maximum)	147	150	151	156
Chain sales \$	20,192,600	18,166,500	20,750,300	27,443,600
Tobacco stores and stands --				
Chains (number)	6	4	4	4
Stores (maximum)	217	199	199	201
Chain sales \$	7,185,800	10,818,300	12,792,900	14,219,600
Liquor stores --				
Chains (number)	9	8	8	8
Stores \$	615	536	538	545
Chain sales \$	112,397,800	155,980,300	211,075,300	249,022,800

(1) In some instances figures for 1945 have been revised.

Table 4.--Chains, Stores and Sales by Provinces, 1941, 1944 - 1946

	1941	1944	1945(1)	1946	Per cent change 1945-1946
Canada Total, All Chains--					
Chains (number)	533	435	435	428	
Stores (maximum)	8,014	6,829	6,783	6,823	
Chain sales \$	642,731,700	774,088,400	881,368,000	1,022,419,800	+16.0
N.W.T. and Yukon --					
Chains (number)	5	5	4	4	
Stores (maximum)	62	57	56	54	
Chain sales \$	1,493,600	3,306,200	3,077,800	4,207,000	+36.7
British Columbia --					
Chains (number)	91	77	82	85	
Stores (maximum)	765	666	678	711	
Chain sales \$	63,925,100	79,733,400	92,350,700	109,838,800	+18.9
Alberta --					
Chains	89	75	74	70	
Stores (maximum)	578	504	510	518	
Chain sales \$	36,110,600	51,347,400	58,842,500	65,729,900	+11.7
Saskatchewan --					
Chains (number)	78	61	63	68	
Stores (maximum)	882	701	692	688	
Chain sales \$	32,523,600	43,697,700	49,996,200	59,951,700	+19.9
Manitoba --					
Chains (number)	69	60	64	63	
Stores (maximum)	335	277	280	291	
Chain sales \$	27,437,500	36,573,500	42,810,400	50,106,300	+17.0
Ontario --					
Chains (number)	284	241	230	226	
Stores (maximum)	3,389	2,921	2,860	2,874	
Chain sales \$	295,823,000	336,041,500	385,233,800	439,315,900	+14.0
Quebec --					
Chains (number)	165	135	142	142	
Stores (maximum)	1,443	1,234	1,232	1,218	
Chain sales \$	132,325,000	156,297,800	175,842,000	204,940,300	+16.5
New Brunswick --					
Chains (number)	48	39	41	41	
Stores (maximum)	217	178	185	179	
Chain sales \$	19,827,600	24,169,300	27,559,900	37,232,500	+35.1
Nova Scotia --					
Chains (number)	57	48	49	47	
Stores (maximum)	326	277	276	276	
Chain sales \$	32,237,700	42,125,800	44,697,600	50,001,300	+11.9
Prince Edward Island --					
Chains (number)	10	9	9	9	
Stores (maximum)	17	14	14	14	
Chain sales \$	1,028,000	795,800	957,100	1,096,100	+14.5

(1) In some instances figures for 1945 have been revised.

Table 5.--Retail Chains Classified According to Type of Operation,
1941, 1944 - 1946

Type of Operation	Number of Chains	Number of Stores	Chain Sales	
			Amount	Per cent of total
	1 9 4 1			
Total, All Chains	533	8,014	\$ 642,731,700	100.0
Local chains	176	1,092	60,888,300	9.5
Provincial chains	234	3,160	287,495,000	44.7
Sectional and National chains .	123	3,762	294,348,400	45.8
	1 9 4 4			
Total, All Chains	435	6,829	\$ 774,088,400	100.0
Local chains	139	879	65,172,600	8.4
Provincial chains	195	2,834	371,857,900	48.1
Sectional and National chains .	101	3,116	337,057,900	43.5
	1 9 4 5 (1)			
Total, All Chains	435	6,783	\$ 881,368,000	100.0
Local chains	136	883	71,611,800	8.1
Provincial chains	195	2,789	445,611,300	50.6
Sectional and National chains .	104	3,111	364,144,900	41.3
	1 9 4 6			
Total, All Chains	428	6,823	\$ 1,022,419,800	100.0
Local chains	138	909	83,914,400	8.2
Provincial chains	188	2,796	503,829,900	49.3
Sectional and National chains .	102	3,118	434,675,500	42.5

(1) In some instances figures for 1945 have been revised.

Table 6.--Retail Chains Classified According to Number of Units Operated
1941, 1944 - 1946

	Number of Chains	Number of Stores	Chain Sales	
			Amount	Per cent of total
	1 9 4 1			
Total, All Chains	533	8,014	\$ 642,731,700	100.0
Less than 6 units	223	968	71,938,200	11.2
6-10 units	166	1,261	80,730,000	12.6
11-25 units	79	1,281	82,439,200	12.8
26-50 units	36	1,272	80,859,700	12.6
51-100 units	16	1,155	77,879,500	12.1
100 or more units	13	2,077	248,885,100	38.7
	1 9 4 4			
Total, All Chains	435	6,829	\$ 774,088,400	100.0
Less than 6 units	162	716	62,954,000	8.1
6-10 units	137	1,028	79,359,000	10.3
11-25 units	78	1,290	108,332,200	14.0
26-50 units	30	975	101,617,800	13.1
51-100 units	17	1,184	108,785,800	14.1
100 or more units	11	1,636	313,039,600	40.4
	1 9 4 5 (1)			
Total, All Chains	435	6,783	\$ 881,368,000	100.0
Less than 6 units	163	713	63,830,400	7.3
6-10 units	139	1,040	95,249,600	10.8
11-25 units	77	1,280	125,509,500	14.2
26-50 units	29	999	115,817,800	13.1
51-100 units	16	1,136	121,307,100	13.8
100 or more units	11	1,615	359,653,600	40.8
	1 9 4 6			
Total, All Chains	428	6,823	\$ 1,022,419,800	100.0
Less than 6 units	151	654	70,002,600	6.8
6-10 units	144	1,082	118,186,900	11.6
11-25 units	74	1,218	140,666,900	13.8
26-50 units	31	1,045	139,267,300	13.6
51-100 units	17	1,196	142,946,100	14.0
100 or more units	11	1,628	411,350,000	40.2

(1) In some instances figures for 1945 have been revised.

Table 7.--Retail Chains Classified According to Amount of Annual Retail Sales,
1941, 1944 - 1946

Annual Sales Volume of Chain	Number of Chains	Number of Stores	Chain Sales	
			Amount	Per cent of total
	1 9 4 1			
Total, All Chains	533	8,014	\$642,731,700	100.0
Under \$100,000	83	447	5,588,800	0.8
\$100,000 - \$199,999	104	607	15,290,900	2.4
\$200,000 - \$499,999	160	1,287	50,556,300	7.9
\$500,000 - \$999,999	84	1,022	60,805,700	9.5
\$1,000,000 - \$4,999,999	79	2,405	159,941,600	24.9
\$5,000,000 and over	23	2,246	350,548,400	54.5
	1 9 4 4			
Total, All Chains	435	6,829	\$774,088,400	100.0
Under \$100,000	34	192	2,461,400	0.3
\$100,000 - \$199,999	77	510	11,517,400	1.5
\$200,000 - \$499,999	126	845	40,658,500	5.3
\$500,000 - \$999,999	74	727	53,611,300	6.9
\$1,000,000 - \$4,999,999	98	2,262	192,332,900	24.8
\$5,000,000 and over	26	2,293	473,506,900	61.2
	1 9 4 5 (1)			
Total, All Chains	435	6,783	\$881,368,000	100.0
Under \$100,000	25	146	1,612,000	0.2
\$100,000 - \$199,999	65	397	9,820,900	1.1
\$200,000 - \$499,999	135	857	44,452,900	5.0
\$500,000 - \$999,999	74	659	52,212,200	5.9
\$1,000,000 - \$4,999,999	109	2,383	213,871,000	24.3
\$5,000,000 and over	27	2,341	559,399,000	63.5
	1 9 4 6			
Total, All Chains	428	6,823	\$1,022,419,800	100.0
Under \$100,000	19	117	1,301,400	0.1
\$100,000 - \$199,999	54	292	8,327,000	0.8
\$200,000 - \$499,999	118	725	39,525,400	3.9
\$500,000 - \$999,999	88	798	60,047,400	5.9
\$1,000,000 - \$4,999,999	120	2,486	256,321,500	25.1
\$5,000,000 and over	29	2,405	656,897,100	64.2

(1) In some instances figures for 1945 have been revised.

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