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## DOMINION BUREAU OF STATISTICS

## CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS

## DRUG STORE CHAINS

## IN

## CANADA

1930

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CENSUS OF MERCHANDISING AND SEKVICE ESTABLISHMENTS, 1931.

## DFUG STORE CHATNS

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## Introciuction

This report on drug store chains is one of a series presenting facts obtained in connection with the Census of iferchandising and Service Establishments, which formed part of the Seventh Decennial Census of Canada. Figuros wore received from all chain organizations operating in the retail drug field during 1930 and covering the trading operations of these chains durirg that year.

The 31 chains analyzed in this report operated 292 stores, which had total seles during 1930 of $\$ 15,971,087$. Of the total number, 8 chains with 103 stores indicated chat they operated lunch counters, while 23 chains with 189 stores reported no lunch counter service. The 8 chains with lunch counters had total sales of $\$ 5,858,431$, of which lunch counter receipis, including soda fountain sales, amounted to $\$ 326,660$, or almost 16 per cent of the total sales of these chains.

There were 1,165 full-time male employees and 255 full-time female employees, who received a total salary of $\$ 1,859,718$. Part-timers received $\$ 21,185$. The total wage bill was, therefore, $\$ 1,880,903$, and other operating expenses, incluaing rent, amounted to about the same figure, or $\$ 1,888,927$, thus making a total operating expense of 26.98 per cent of net sales. Of the total number of stores, 282 were operated in leased premises, for which rental costs averaged 6.19 per cent of sales in such premises.

## Chains Defined

For this Census, a group of four stores or more under the same ownership and management and carrying on the same or similar kinds of business has been classified as a chain. Groups of two or three stores owned and operated by one proprietor or firm have been classified as two- or three-store multiples - not as chains - and are reported under these headings in the provincial general retail reports. So-called voluntary chains, in which the stores are individually owned and operated, but are grouped for buying and/or advertising purposes, are not considered as chains, but figures for these stores have been shown separately in the provincial retail reports. Chains have been classified as local, provincial, sectional and national, depending upon the extent of territory in which their branches are located. Local chains are located entirely, or almost so, within the same town or city. Provincial chains are located within one province. The units of sectional chains are spread over two or three provinces, while national chains have stores in four provinces or more.

## Age and Geographic Distribution of Units

Of the 270 units of drug chains whose ages could be determined, 27, or 10 per cent, were opened in 1930, 87, or 30 per cent of the total, were opened in the four preceding years, and 162, or 60 per cent, were in operation prior to 1926.

When the 292 units of drug chains were classified according to geographic divisions, it is found that 137 were located in Ontario and 54 in Quebec. British Columbia came next with 41 units, followed by the Prairie Provinces with 37 and the Maritime Provinces with 23.

## Geographic Distribution of Sales

In Table II, the total sales of all drug chains are analyzed by provinces, showing that approximately 50 per cent of all chain drug sales were made in Ontario. Quebec was next in importance with about 17 per cent of the total amount, followed by British Columbia with 14.6 per cent, the Prairie Provinces with 12.7 per cent, and the Maritimes with 5.7 per cent. In order to avoid disclosing the operations of individual concerns, it has been found necessary to combine the figures for the three Prairie Provinces and also for the Maritime Provinces. For the same reason, it is not possible to further analyze these sales showing the amounts by size of city.

## Credit Sales

Ten of the 31 drug store chains reported that they sold on credit. Total net sales of these chains amounted to $\$ 2,599,881$, of which credit sales were $\$ 299,638$, or 11.52 per cent of the total. There were 13 chains with total sales of $\$ 8,355,606$ which reported that they sold only for cash, while the remaining 8 organizations did not indicate whether they sold for credit or not.

## Operating Expenses

In addition to the amounts paid in salaries and wages and rental costs, each firm was asked to report other operating expenses. Other operating expenses include taxes, insurance, maintenance, delivery from stores, stationery and supplies, light, heat, power, interest on money borrowed for current business operations, and any other operating expense. The cost of goods purchased for resale was of course excluded, as well as any items on capital account. Chain store warehouses were considered as wholesale establishments for this Census and have been included in the wholesale reports. Expenses in connection with these warehouses are therefore excluded from this report.

Operating expenses are analyzed in Table IV. The chains are classified, first, according to type of operation, secondly, according to number of stores operated, then by total sales volume of the chain, and then by average sales per store. A table is also included showing operating expenses of chains operating lunch counters as compared with those not providing this service.

Of the 31 organizations analyzed in this bulletin, 24 were local chains, each operating entirely within one town or city. There were 5 chains each operating entirely within one province, although not confined to one city, and two chains had stores spread over two or more provinces. The 24 local chains operated 174 stores and had sules of $\$ 6,696,634$, or approximately 48 per cent of the totul sales of all drug chains. Total operating expense for local chains amounted to 26.66 per cent of net sales, as compared with 27.28 per cent for provincial, sectional and national chains.

When classified according to number of units operated, it is seen that there were 6 chains which had more than 10 stores each, 10 chains had from 6 to 10 units each, and there were 15 chains each having less than 6 stores. The 6 chains, each having more than 10 units, operated 50 per cent of the total number of drug chain stores and accounted for approximately 60 per cent of the total drug chain sales. These 6 chains operated on a total expense ratio to sales of 26.27 per aent, as compared with 27.67 per cent for chains having from 6 to 10 units, and 28.52 per cent for chains with less than 6 units.

There were 5 chains each having a total sales volume of over $\$ 500,000$, and there were 4 chains each of whose total sales for the year mounted to less than $\$ 100,000$. The highest operating expense ratio, 29.10 per cent of net sales, was reported by chains whose total sales volume lay between $\$ 100,000$ and $\$ 250,000$ and the lowest, 26.17 per cent of net sales, was obtained by the 5 largest chains already mentioned.

When analyzed according to average sules per unit, it is found that the lowest total operating expense ratio was obtained by the 10 chains having average annual sales per store of over $\$ 45,000$ and the highest ratio was obtained by those chains whose average sales per store were less than $\$ 30,000$

In Table IV(e), a distinction has been made as between chains operating stores with lunch counters and those which did not provide this servjce. The 8 chains selling meals operated 103 stores and had total sales in the year 1930 of $\$ 5,858,431$, of which the sale of meals amounted to $\$ 926,660$. These chains operated on an expense ratio to sales of 28.57 per cent, of which payroll amounted to 14,01 per cent, and other operating expenses, including rent, 14.56 per cent. Kent paid for leased premises amounted to 7.51 per cent of sales made in these premises. In comparison with these figures, chains providing no lunch counter service operated on an expense ratio of 25.84 per cent of net sales. This figure includes a payroll item of 13.07 per cent and other operating expenses of 12.77 per cent of net sales. Rental cost to sales amounted to 5.23 per cent, as compared with 751 per cent for chains operating lunch counters.

## Middle Range Figures

The expense figures given in the preceding paragraphs and shown in Table IV were obtained by totalling the expense data given for each chain and expressing this total as a percentage of the total sales of the same companies. That is to say, these are weighted averages in which a large chain has more weight in determining the ratio for the group than a smaller organization. In Table V, average operating figures are given where each chain has been given the same weight irrespective of its size. Using this method, it is found that the average total operating expense for drug store chains was 27,89 per cent of net sales, as compared with 26,98 per cent as obtained by the other method. Upon referring to Table $V$, it will be seen that three values are given for total operating expenses under the headings: "Lower Limit of Middle Range", "Average of Middle Range", and "Upper Limit of Middle Range". The method of obtaining these three figures for total operating expense will be explained.

The total operating expense (including salaries, rent and other expenses) for each chain was expressed as a percentage of its total sales. These percentages were arranged in ascending noder of magnitude. The array thus obtained was then divided into three ranges: the lower range, consisting of the first-quarter of the figures, and therefore including the lowest, operating ratios; the upper range. consisting of the last-quarter of the figures and including the highest percentages; and the middle range, containing the remaining half of the figures The average of the middle range was then foundo. Thus, after omjtting the extremely high and low $f i g u r e s$, due in most instances to exceptional circumstances, the remaining chains were given equal wejght in obtaining an average operat.ing expense ratio for the group. The "Lower Limit of the Middle Range" and "Upper Limit of the Middle Range" are, of course, the two walues at either end of the middle group nf figures.

Upon referring to Table $V$ ，it will be seen that the lower limit of the midale range for total operating expenses of drug store chains was 24.33 per cent， the upper limit was 31.54 per cent，and the averuge of the midale range was 27.89 per cent．Or，jn other words，one－quarter of the drug chains had a total operat－ ing expense ratio of less than 24.33 per cent of sales，one－quarter of the chains had a total expense ratio of more than 31.54 per cent of sales，and one－half of the drug chains had an expense ratio lying between these two figures and centering around 27,89 jer cent．The otner items in this table were obtained in a manner similar to that used in the case of total operating expense．For example，the average figures for pay roll cost of drug chains was 14.41 per cent of net sales． this figure was obtained by expressing the payroll cost of each chain as a per－ centage of its total sales，arranging these percentages in ascending order of magnitude，omitting the lower and upper quarters of the range und taking the average of the middle group．The boundary figures of the middle range in this case were 12.98 per cent and 16.42 per cent．That is to say，one－quarter of the chains had a payroll cost of less than 12.98 per cent of sules，one－quarter of the chains had a payroll cost of more tian 16,42 per cent，and one－half the firms had a payroll cost ratio lying between these figures，and the average of these ratios was 14.41.

Each item in Table $V$ was obtained by arranging the corresponding items for aach ohain in an array and following the procedure already outlined for total operatin：expense and payroll cost．In interpreting these middle range figures， then，each item must be considered independently as neither all the high nor all the low figures came from the same reports．That is to say，the items in any c．）lumn in this middle range table cannot be related to other items in the same column．For instance，the upper limit of the middle range for average sales per store of drug store chains was $\$ 45,858$ ．The upper limit of the middle range for total operating expense was 31.54 per cent of net sales．Obviously，however，these two values cannot be related since the drug store chains with high querage sales per store have the smallest operating expense．Nor is it probable that any one chain would have all its items equal to the average figures given in this table， but it is thought that，considering each item independently，these middle range figures give a fair indication of drug store chain operating results．

## Commodities Sold by Drug Store Chains

A partial analysts of the sales made by drug chains is given in Table W．Very few of the larger chains were able to break down their total sales in accordance with the outline provided in the Gensus schedules，but，whenever possible，a breakdown，even if incomplete，was secured．Dre to the incomjleteness of the data received for these drug chains，the percentages given for the various． commodities should only be considered approximately correct．Sales of drugs and lrug sundries are shown to be 47.42 per cent of the total drug chain sales，of which prescriptions amounted to 14.99 per cent．Toilet articles and preparations were next in importance，amounting to 29.55 per cent of the total，while recoipta from the sale of meals，including ice eream and soda fountain sales．A厄⿱宀八九保ted to 9.57 per centof all．drug chain sales

## Summary of Druc Store Chains



Table II

## Stores and Sales Ciassified by Provinces



Chain Units Classified by Geographic Location and Date of Establishment

| Gecgraphic Division | Total units | Per cent of total units | Date of establishment of units |  |  |  |  | $\begin{gathered} \text { Before } \\ 1926 \\ \hline \end{gathered}$ | Units mhose ages cannot be classified |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  |  |  | 1930 | 1923 | 1928 | 1927 | 1926 |  |  |
| Sanada, total | 292 | 100.00 | 27 | 37 | 19 | 13 | 12 | 162 | 22 |
| British Columbia | 42 | 14.04 | 2 | 5 | 2 | 1 | - | 14 | 17 |
| Alberta | 19 | 6.51 | 1 | 5 | 3 | - | 1 | 9 | - |
| Saskatcizewan | 7 | 2.40 | 1 | 2 | - | 1 | - | 3 | - |
| Manitoba | 11 | 3.77 | - | 2 | 1 | - | 1 | 7 | - |
| Ontario | 137 | 46.92 | 14 | 15 | 6 | 10 | 9 | 83 | - |
| Quebec... | 54 | 18.50 | 5 | 4 | 4 | 1 | 1 | 34 | 5 |
| New Brunswick | 4 | 1.37 | - | 2 | 1 | - | - | 1 | - |
| Nova Scotia | 18 | 6.15 | 3 | 2 | 2 | - | - | 11 | - |
| Prince Edward Island ....... | 1 | . 34 | 1 | - | - | - | - | - | - |

Table III(b)
Chain Units Clessified by Date of Establishment and Size of Chain

|  | Total units |  | Units in ahains of - |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | Number | Per cent of total | More than 10 units | 6-10 units | Less than 6 units |
| Total, All Units | 292 | - | 147 | 80 | 65 |
| age | 22 | - | 22 | - | - |
| Units classified as tc agə ............................. All units estaolished | 270 | 100.00 | 125 | 80 | 65 |
| 1930 . | 27 | 10.00 | 14 | 3 | 10 |
| 1929. | 37 | 13.71 | 15 | 14 | 8 |
| 1928. | 19 | 7.04 | 5 | 5 | 9 |
| 1927. | 13 | 4.81 | 7 | 3 | 3 |
| 1926 | 12 | ¢. 4.4 | 9 | 1 | 2 |
| Before 1926 ............................ | 162 | 60.00 | 75 | 54 | 33 |

## Drug Store Chain Operating Expenses

A. Chains Classified by Type of Operation.

|  |  |  |  |  |  |  | Operating | expens |  |  | Rent paid in leased premises per \$100 of sales in such premises |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | $\begin{gathered} \text { Number } \\ \text { of } \\ \text { chains } \end{gathered}$ | $\begin{aligned} & \text { Numoer } \\ & \text { of } \\ & \text { units } \end{aligned}$ | Net sales (1930) | Per cent of units opened in 1930 | Total | $\begin{array}{\|l} \text { Per } \\ \$ 100 \\ \text { sales } \end{array}$ | Payroll | $\begin{gathered} \text { Per } \\ \$ 100 \\ \text { sales } \end{gathered}$ | Other expenses, including rent | Per $\$ 100$ sales |  |
| Total, All Chains | 31 | 292 | $13,971,08 ?$ | 9.25 | $3,769,830$ | 26.98 | $1,880,903$ | 13.46 | $1,888,927$ | 13.52 | 6.19 |
| Local chains ........ | 24 | 174 | 6,696,634 | 8.62 | 1,785,264 | 26.66 | 953,956 | 14.25 | 831,308 | 12.41 | 6.08 |
| Provincial chains ... | 5 | 75) |  |  |  |  |  |  |  |  |  |
| Sectional chains .... National chains | 1 | $\begin{array}{r} 6) \\ 37) \end{array}$ | $7,274,453$ | 10.17 | 1,984,566 | 27:28 | 926,947 | 12.74 | 1,057,619 | 14.54 | 6.29 |

$\infty$
B, Chains Classified According to Number of Units Operated,

Total, All Chains Chains having More than 10 units. 6 - 10 units ,.o..... Less than 6 units..

| Total, All Chains | 31 | 292 | $\begin{gathered} \$ \\ 13,971,087 \end{gathered}$ | 9,25 | $3,769,830$ | 26.98 | $\begin{gathered} \$ \\ 1,880,903 \end{gathered}$ | 13.46 | $1,888,927$ | 13.52 | 6.19 |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| Chains having - |  |  |  |  |  |  |  |  |  |  |  |
| More than 10 units. | 6 | 147 | 8,339,120 | 9.52 | 2,190,766 | 26.27 | 1,076,120 | 12.90 | 1,114,646 | 13, 37 | 6.10 |
| 6 - 10 units .,.o... | 10 | 80 | 3,195,612 | 3.75 | 884,222 | <2, 67 | 469,970 | 14.71 | 414,252 | -1E.96 | 6.16 |
| Less than 6 units . | 15 | 65 | 2,436,355 | 15.38 | 694,842 | 28.5\% | 334,813 | 13.74 | 360,029 | 14,78 | 6.61 |


| Total, All Chains | 31 | 292 | $13,971,08 ?$ | 9,25 | $3,769,830$ | 26.98 | $\begin{gathered} \$ \\ 1,880,903 \end{gathered}$ | 13.46 | $1,888,927$ | 13.52 | 6.19 |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| Chains having - |  |  |  |  |  |  |  |  |  |  |  |
| More than 10 units. | 6 | 147 | 8,339,120 | 9.52 | 2,190,766 | 26.27 | 1,076,120 | 12.90 | 1,114,646 | 13, 57 | 6.10 |
| 6 - 10 units .,.o... | 10 | 80 | 3,195,612 | 3.75 | 884,222 | 27.67 | 469,970 | 14.71 | 414,252 | -12.96 | 6.16 |
| Less than 6 units . | 15 | 65 | 2,436,355 | 15,38 | 694,842 | 28.5\% | 334,813 | 13.74 | 360,029 | 14,78 | 6.61 |

## Drug Store Chain Operating Expenses

C. Chains Classified According to Total Sales Volume.

Total, All Chains
Chains whose total sules are More than $\$ 500,000$ \$250,000 - \$500,000 $\$ 100,000-\$ 250,000$ Less than $\$ 100,000$

| $\begin{gathered} \text { Number } \\ \text { of: } \\ \text { chains } \end{gathered}$ | $\begin{gathered} \text { Number } \\ \text { of } \\ \text { units } \end{gathered}$ | Net sales (1930) | $\begin{array}{cc} \text { Per cent } \\ \text { of units } \\ \text { opened } \\ \text { in } 1930 \end{array}$ | Operating expenses |  |  |  |  |  | Rent paid in leased premises per \$100 of sales in such premises |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  |  |  |  | Total |  | Pay roll |  | ```Otner ex- penses, including rent.``` | Per 4100 sales |  |
| 31 | 29\% | $\begin{gathered} \$ \\ 13,971,087 \end{gathered}$ | 9.25 | $\begin{gathered} \$ \\ 3,769,830 \end{gathered}$ | 26.98 | $\begin{gathered} \$ \\ 1.880 .903 \end{gathered}$ | 13.46 | $\begin{gathered} \$ \\ 1,888,927 \end{gathered}$ | 13.52 | 6.19 |
| 5 | 129 | 8,396,837 | 10.85 | 2,197,202 | 26.17 | 1,073,002 | 12.78 | 1,124,200 | 13.39 | 5.99 |
| 8 | 62 | 2,759,625 | 6.45 | 760,689 | 27.56 | 379,018 | 13.73 | 381,671 | 13.83 | 6.60 |
| 14 | 84 | $2,479,173$ | 7.14 | 721,534 | 29.10 | 375,551 | 15.15 | 345,983 | 13.95 | 6.79 |
| 4 | 17 | 335,452 | 17,65 | 90,405 | 26.95 | 53,332 | 15.90 | 37,073 | 11.05 | 3.88 - |

D., Chains Classified Hccording to Average Sales per Store.

| Sotizl, Al Chains | 31 | 292 | $13,971,087$ | 9.25 | $\begin{gathered} \$ \\ 3,769,830 \end{gathered}$ | 26.98 | $\begin{gathered} \frac{\pi}{8} \\ 1,880,903 \\ \hline \end{gathered}$ | 13.46 | $1,888,92 ?$ | 13.52 | 6.19 |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| Chairs whose avercee sales per store are- |  |  |  |  |  |  |  |  |  |  |  |
| Over \$45,00) . .0... | 10 | 163 | 10,058,711 | 9.82 | 2,690,838 | 26.75 | 1,312,188 | 13.05 | 1,378,650 | 15.70 | 6.41 |
| \$30,000 - \$45,0r10 . | 11 | 63 | 2,438,441 | 6.35 | 659,992 | 27.07 | 333,814 | 13.69 | 326,178 | 18.38 | 5.43 |
| Less timan \$30, (1) .o | 10 | 66 | 1,473,935 | 10.61 | 419,000 | 28.43 | 234,901 | 15.94 | 184,099 | 12. 49 | 5.78 |

## Drug Store Chain Operating Expenses

E. Chains Classified on Basis of Lunch Counter Service Provided.:

|  | Number <br> of chains | Number <br> of units | Net sales (1930) | Per cent of units - opened in 1930 | Operating expenses |  |  |  |  |  | Rent paid in leased premises per $\$ 100$ of sales in such premises |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  |  |  |  |  | Total | $\begin{aligned} & \text { Per } \\ & \$ 100 \\ & \text { sples } \end{aligned}$ | Payroll | $\begin{aligned} & \text { Per } \\ & \$ 100 \\ & \text { sales } \end{aligned}$ | Other expenses, including rent | Per $\$ 100$ sales |  |
| Total, All Chains | -31 | 292 | \$\$ <br> $13,971,087$ | 9.25 | 4 $3,769,830$ | <6.98 | $\begin{gathered} \$ \\ 1,880,903 \\ \hline \end{gathered}$ | 13.46 | $1,888,927$ | 13.52 | 6.19 |
| Bhains with lunch counters........... | 8 | 103 | $5,858,431$ | 6.80 | 1,673,850 | 28.57 | 820,510 | 14.01 | 853,340 | 14.56 | 7.51 |
| Shains without lunch counters ............. | 23 | 189 | 8,112,656 | 10.58 | 2,095,380 | 25.84 | $1,060,393 \mid$ | 13.07 | $1,035,537$ | 12.77 | 5.23 |

Table $V^{(x)}$ Miidale Fange Figures

|  | $\begin{aligned} & \text { Lower Limit } \\ & \text { of } \\ & \text { iaidde Range } \end{aligned}$ | Average of Middle Bange | $\begin{aligned} & \text { Upper Limit } \\ & \text { Midale Fange } \end{aligned}$ |
| :---: | :---: | :---: | :---: |
| Total number of stores | 1 | 6 | 9 |
| Total sales volume of chain | \$ 151,323 | ¢ 250,189 | * 391,910 |
| Average sales por store | \$ 27,760 | - 37,782 | * 45,858 |
| Per cent of total number of stores opened in 1930 | 0.00 | 9.10 | 18.18 |
| Payroll cost per $\$ 100$ sales | 12.98 | 14.41 | 16.42 |
| Rental cost per ${ }^{\text {c }} 100$ sales in leased premises | 4.56 | 5.79 | 6.69 |
| Other operating expense - not including salaries or rent ..... | 5.55 | 7.12 | 9.05 |
| Total operating expense per $\$ 100$ sales ........................ | 24.33 | 27.89 | 31.54 |
| Average yearly salary per full-time employee .................. | \% 1,028 | \& 1,200 | * 1,443 |
| Number of employees per $\$ 100,000$ sales ......................... | 9.28 | 11.95 | 14.99 |

( $x$ ) Since each item in tinis table was obtained independently, the figures in any one column cannot be related to each other. Nor can the individual expense items be added to obtain the total expense ratios shown. For explanations on the method of obtaining these figures, see introduction.

## DRUG STORE CHAINS

## Sales by Commodities



