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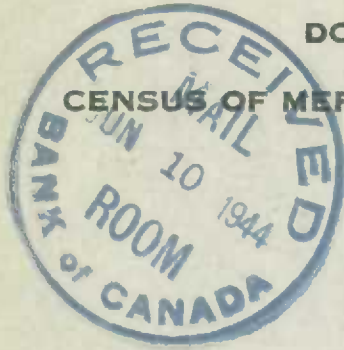
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CANADA

DOMINION BUREAU OF STATISTICS

CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS



FOOD CHAINS

IN

CANADA

CALENDAR YEAR

1941



**OTTAWA
1944**

Price 25 cents

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CENSUS OF MERCHANDISING AND SERVICE ESTABLISHMENTS

FOOD CHAINS IN CANADA, 1941

SUMMARY

Total sales of the food chains in 1941 amounted to \$177,405,900, representing an increase of 39.1 per cent over the total dollar volume obtained by all food chains in 1930. During the same period the maximum number of stores operated by the food chains dropped from 2,352 in 1930 to 1,707 outlets in 1941. Sales of the food chains in 1941 exceeded those of the earlier year in all provinces except Saskatchewan where a slight decrease was recorded, but the percentage rates of increase in the other provinces varied sharply from the average for the Dominion. In both years, however, sales of chain food stores in Ontario, Quebec, and British Columbia provided slightly over four-fifths of the total sales volume.

Three phases in the operations of the food chains are apparent during the eleven-year period. Thus, in the 1930-1934 period, sales dropped from \$127,582,500 in 1930 to \$104,912,800 in the latter year associated with a slight increase in the number of stores operated; between 1934 and 1937, total sales rose to \$121,054,800 accompanied by a slight drop in stores operated; and between 1937 and 1941 total sales of the food chains rose sharply to \$177,405,900 notwithstanding a decrease of 580 chain units in the number of stores operated.

During 1941, the food chains secured about 27 per cent of the total sales made by all grocery, combination and meat and fish market stores in Canada, slightly greater than the share of the market obtained by the food chains in 1930. The competitive situation in Ontario and British Columbia, however, was apparently much keener than in the other provinces, the percentage of chain to total sales between 1930 and 1941 rising from 34 per cent to 38 per cent in Ontario, and from 27 per cent to 34 per cent in British Columbia. When examined by size of locality, the food chains are found to have increased their share of the available market between 1930 and 1941 in places with populations of 30,000 to 100,000, and in places with populations of 100,000 and over, maintained their position in locality-size groups of 10,000 to 30,000 and lost some ground in smaller places of less than 10,000 population.

A marked trend toward a reduction in total number of units and a progressively increasing number of stores with sharply larger individual sales volumes is apparent between 1934 and 1941. This movement was even more pronounced between 1937 and the later year when a sharp reduction in the number of stores with annual sales volumes of less than \$100,000 per store coincided with a considerable increase in the number of units having annual sales in excess of \$100,000 per store. A particularly noteworthy development during this period is the appearance of units with very large annual sales volumes. Thus, 14 stores in 1937 had individual sales ranging between \$300,000 and \$500,000 per store; in 1941, however, 110 units were classified in this group, and an additional 38 outlets experienced sales volumes between \$500,000 and \$1,000,000 per year.

The interval between 1930 and 1941 was also characterized by a closure of many of the older chain units accompanied by the opening of fewer new outlets promising greater profits and larger sales volumes. Thus, of the 1,882 chain food stores which were in operation in 1930 and established previously to that year, only 652 were reported in business in 1941. This represents the closure of 1,230 units, or 65 per cent of those stores which in 1930 had been in operation for at least one year. Conversely, of the stores opened by the food chains between 1929 and 1941, 1,007 outlets were still in business during the recent census year. While complete data on the openings and closings of stores are not available for the intercensal period, it is apparent that a major turnover in the number of stores used by the food chains occurred within this period.

GENERAL ANALYSIS

Introduction

The food chains analyzed in this report are enterprises with four or more retail outlets and consist of three types of organizations: grocery chains, combination chains, and meat and fish market chains. For purposes of classification, grocery stores are considered to be those which do not handle fresh meats and in which sales of groceries predominate; combination stores are those which handle both groceries and fresh meats; meat and fish stores are those which specialize principally in the sale of either of these types of commodities. Fresh fruits and vegetables, however, are sold in almost all grocery and combination stores. Food chains are classified into the above types on the basis of the kind of food stores predominating within each chain organization. Thus, each of these three types of chain may contain a minority of individual chain outlets differing from the classification of the chain as a whole. Grocery chains, according to Table 3, operated 448 stores in 1941, of which 22 were combination units and 14 consisted of other kinds. Combination chains in the same year had 1,093 stores in operation, of which 323 were grocery outlets and 8 belonged to other types.

In this report different comparisons are made between statistics obtained from the first complete Census of Merchandising for 1930 and those provided by the second complete Census of Merchandising for 1941. These comparisons reveal various changes which occurred in the positions of the food chains during the intercensal period. Some comments are therefore required on the appropriate statistics of each census year.

In 1941, the total dollar value of retail trade through all types of retail stores amounted to \$3,440,901,700, exceeding by 24.9 per cent retail sales of \$2,755,569,900 obtained in 1930. Total retail sales of all grocery, combination, and meat and fish market stores (included in the grand totals) amounted to \$650,630,700 in 1941, an increase of 33.2 per cent over the dollar volume of such stores in 1930. Reflecting in part a trend toward the combination type of food store, sales of these outlets in 1941 were 86.4 per cent above the dollar volume obtained in 1930; sales of grocery stores in 1941 recorded an increase of 9.2 per cent over 1930; and the dollar volume of meat and fish stores in 1941 was unchanged from the earlier period.

Total sales of the food chains in 1941 recorded a sharp increase over the dollar volume recorded in 1930, the increase on a percentage basis amounting to 39.1 per cent for the Dominion. The Bureau's retail food price index for chain food stores, however, showed a higher level of food prices in 1930 prevailing than in 1941, the yearly averages of these indexes for the two years, on the base 1935-1939 = 100, standing at 122.3 and 114.9 respectively. In terms of the physical turnover of merchandise, therefore, the increase between the two years was even greater than the 39.1 per cent mentioned above.

Table I presents the comparative position of all food chains in 1930 and 1941 for Canada, for the provinces, and for regional areas of the Dominion. Both the number of food chains and the number of chain outlets in the Dominion decreased between these years. On the other hand, the total dollar volume of food chains in 1941 exceeded that of 1930 by about 39 per cent accompanied by an even greater increase in average sales per store of 91.6 per cent.

Although food chains increased their share of the total sales volume of all grocery, combination and meat and fish stores in Canada from 26.1 per cent in 1930 to 27.4 per cent in 1941, this change was by no means uniform for the different provinces of the Dominion. In Ontario, sales of food chains accounted for 37.9 per cent of the sales of all of these kinds of retail outlets in 1941 compared with 34.2 per cent in 1930, and in British Columbia the sales of the food chains comprised 34.3 per cent of total sales of these stores in 1941 against a corresponding figure of 27.2 per cent in the previous census year. The food chains likewise increased their share of the retail food business in Alberta, Manitoba, and the Maritime Provinces in 1941 over that obtained in 1930. In Quebec and Saskatchewan, however, the food chains lost ground, the percentages dropping from 16.9 per cent to 15.0 per cent between 1930 and 1941 for the former province, and from 32.1 per cent to 29.6 per cent for the province of Saskatchewan.

Average sales per chain outlet have shown a sharp increase between the two census years in all provinces of the Dominion. The greatest gains in average sales per store occurred in Quebec, Manitoba and Ontario with percentage increases over 1930 amounting to 177.8 per cent, 106.4 per cent, and 96.7 per cent respectively. Quebec and Ontario were the only two provinces in which average dollar volume per chain outlet for 1941 exceeded \$100,000 but Manitoba nearly attained this figure having an average turnover of about \$97,000. Quebec is particularly noteworthy in that while the number of food chains and the number of stores each declined by about 46 per cent between 1930 and 1941, the increase in sales per outlet amounted to 177.8 per cent and average sales per store of \$133,071 was the highest average attained in any of the provinces. This development in the province of Quebec no doubt reflects the impact of chain store taxes introduced by the provincial government during the intercensal period.

Distribution of Sales by Kind of Chain

Combination chains secured about 83 per cent of the sales of all food chains in 1941. Grocery chains obtained about 15 per cent of the total sales of the food chains during the same year and the balance of the business was done by the meat and fish market chains.

The importance of combination stores in terms of volume of sales is emphasized by the statistics contained in Table 3. Thus, a total of 784 combination stores, operated by both grocery and combination chains, obtained sales of \$131,823,500 in 1941, or 76.5 per cent of the total dollar volume of both kinds of chains. The 735 grocery stores operated by these chains with total sales of \$39,936,200 on the other hand, accounted for about 22 per cent of the total sales of both grocery and combination chains.

Both the number of combination units operated by such chains and the importance of the sales of these outlets have increased between 1930 and 1941. In 1930, combination chains operated 698 combination outlets comprising 51 per cent of all of their stores, and these units did 69 per cent of the total dollar volume of such chains; in 1941, combination outlets comprised 69 per cent of the stores operated and accounted for about 87 per cent of the sales of combination chains.

Trends to Larger Sales Volume Stores

Since 1934 a marked trend may be observed in the chain food trade toward progressively greater individual store volumes accompanied by decreasing numbers of chain outlets in operation. This movement was even more pronounced between 1937 and 1941, when a sharp reduction in the number of stores with annual sales volumes of less than \$100,000 per store coincided with a considerable increase in the number of units with annual sales in excess of \$100,000 per store. The trend to units with annual sales volumes in excess of \$200,000 is even more noteworthy. Thus, in 1934, according to the data presented in Table 4, there were only 25 chain outlets with individual store sales of \$200,000 and over, and these units transacted 5.67 per cent of the sales made by the food chains. In 1937, 68 units with individual sales of \$200,000 and over accounted for 14.74 per cent of all food chain sales. By 1941, however, the dollar volume of stores with sales of \$200,000 and over comprised 50.93 per cent of the total dollar volume of all food chains. In the same year, moreover, 38 units or 2.2 per cent of the outlets operated by the food chains obtained individual annual sales of \$500,000 and over, and these units accounted for 13.08 per cent of the total sales of the food chains in that year.

Table 5 contrasts chain and independent food stores according to amount of annual sales in 1941. The major portion of the business of independent stores is done by outlets with sales of less than \$100,000 per unit. This is in marked contrast to the experience of food chain stores in 1941 where nearly three-quarters of the business was done by units with annual sales of \$100,000 and over. Thus, while 89.8 per cent of the sales of independent food stores are made by outlets with sales volumes of less than \$100,000 per year, 73.1 per cent of the sales of the food chains are made by units with annual turnovers of \$100,000 and over, and only 13.8 per cent of the business is done by chain stores with store volumes between \$50,000 and \$100,000 per year. It is also interesting to note that 75.1 per cent of the sales of independent food stores are made by those units whose individual store volumes range between \$10,000 and \$100,000 per year, with a fairly even distribution of these sales between the four-size ranges comprising the \$10,000 to \$100,000 group.

Distribution of Chain Store Sales by Locality Sizes

Table 6 presents statistics for 1941 on the number and sales of food chain stores classified by provinces and by size of locality. By size of locality, the percentage distribution of the sales of all food chains in 1941 is not markedly different from that prevailing in the previous census year. Chain units situated in centers ranging between 30,000 and 100,000 population obtained a slightly larger share of the total sales of food chains in 1941 than in the former census year. The percentages by size of locality for the two census years are as follows:

Distribution of Food Chain Sales, by Size of Locality

| Size of locality | 1930 | 1941 |
|-----------------------------|--------|--------|
| | % | % |
| Total, all localities | 100.00 | 100.00 |
| 100,000 and over | 44.52 | 44.18 |
| 30,000 - 99,999 | 12.75 | 17.23 |
| 10,000 - 29,999 | 18.30 | 17.12 |
| 1,000 - 9,999 | 19.34 | 16.33 |
| Under 1,000 | 5.09 | 5.13 |

Since the sales of food chains are concentrated principally in the larger urban centers, the distribution of sales in the various provinces is heavily influenced by the different patterns of urbanization. To illustrate, there were no cities in either Alberta or Saskatchewan in 1941 with populations of over 100,000 persons, and localities ranging between 30,000 and 100,000 people provided 66.5 per cent and 48.3 per cent of the sales of the food chains in these provinces. In Nova Scotia where there were also no cities with more than 100,000 persons, sales of the food chains were divided fairly equally between centers ranging between 30,000 to 100,000, 10,000 to 30,000, and 1,000 to 10,000 people, while only a small percentage of the business was done in the rural localities. On the other hand, there were no cities in Manitoba ranging in size between 30,000 and 100,000 people and sales of chain stores in urban areas of 100,000 people and over provided 72.59 per cent of the dollar volume of the food chains in that province.

Marked changes in total sales of chain food stores, and average sales per outlet are noticeable when these statistics are classified by size of locality groupings. The increase in dollar volume between 1930 and 1941 occurred principally in the two larger size-of-locality groups, with the greatest percentage gain in chain volume of 86.9 per cent experienced by the outlets situated in localities ranging between 30,000 and 100,000 people. These data are shown in the following table.

Sales of Food Chains Compared by Size of Locality
1930 and 1941

| Size of locality | Dollar sales | | Increase | % Increase 1941/1930 |
|-----------------------------|-------------------------------|----------------|---------------|-------------------------|
| | 1930 | 1941 | | |
| Total, all localities | \$ 128,291,500 ⁽¹⁾ | \$ 177,405,900 | \$ 49,114,400 | + 38.2 |
| 100,000 and over | 57,112,700 | 78,376,200 | 21,263,500 | + 37.2 |
| 30,000 to 99,999 | 16,352,100 | 30,572,700 | 14,220,600 | + 86.9 |
| 10,000 to 29,999 | 23,484,100 | 30,375,700 | 6,891,600 | + 29.3 |
| 1,000 to 9,999 | 24,805,800 | 28,977,500 | 4,171,100 | + 16.8 |
| Under 1,000 | 6,536,800 | 9,103,800 | 2,567,000 | + 39.2 |

(1) Figure at variance with that shown in Table 1, which has been revised since 1930. This revision cannot be broken down by locality sizes.

Average sales per store in 1930 and 1941 and percentage changes between the two years are presented below by size-of-locality groups. The trend to larger average sales per chain unit is apparent for all size groups and is particularly outstanding for units of the food chains situated in centers with populations in excess of 10,000 people. While chain stores located in cities with populations between 10,000 and 30,000 had the largest average sales per unit, retail outlets situated in localities with populations between 30,000 and 100,000 people experienced the greatest percentage increase between the two census years. Average sales per store in all size-of-locality groups in 1930 were all fairly closely grouped around the Dominion average sales of \$54,523 per store; in 1941, however, a wide gap is apparent between the average sales of stores situated in the three larger size-of-locality groups, and those found in centers with populations ranging up to 10,000 people.

Average Sales per Store of Chain Food Stores,
by size of Locality

| Size of locality | 1930 | 1941 | % change 1941/1930 |
|-----------------------------|--------|---------|-----------------------|
| Total, all localities | 54,523 | 103,928 | + 90.6 |
| 100,000 and over | 55,128 | 115,770 | + 110.0 |
| 30,000 to 99,999 | 49,702 | 129,545 | + 160.6 |
| 10,000 to 29,999 | 70,312 | 140,628 | + 100.0 |
| 1,000 to 9,999 | 53,117 | 74,492 | + 40.2 |
| Under 1,000 | 34,956 | 48,168 | + 37.8 |

Percentage of Food Store Sales Obtained by Food Chains

Since the sales of the food chains are concentrated in the larger urban centers, it is probable that the competitive situation can be shown more accurately by size-of-locality groups than by provinces and for the Dominion as a whole. The ratios of the sales of the food chains to the total sales of all grocery, combination, and meat and fish stores by size of locality for 1930 and 1941 are shown below. These percentages have been heavily influenced by the sales of chain outlets situated in the provinces of Ontario, Quebec, and British Columbia which together accounted for over four-fifths of all food chain sales in the two census years.

Food Chain Ratios, by Size of Locality,
1930 and 1941

(Percentages of chain to total sales for all food stores)

| Size of locality | 1930 | 1941 |
|------------------------|------|------|
| | % | % |
| Canada, Total | 26.3 | 27.3 |
| 100,000 and over | 30.8 | 34.0 |
| 30,000 - 99,999 | 28.3 | 36.7 |
| 10,000 - 29,999 | 31.1 | 32.0 |
| Under 10,000 | 18.5 | 15.8 |

In general, the food chain stores increased their share of the total market in the groups of localities having populations in excess of 30,000 people, consolidated their position in centers with populations between 10,000 and 30,000 people, and actually lost ground in the size-of-locality group of under 10,000 population.

Proportion of Sales Increase Secured by Chain

Total sales of chain and independent grocery, combination and meat and fish market stores were all at higher levels in 1941 than in 1930 in all size-of-locality groups. The following table presents by size of locality a comparison of the increases in the sales of the food chains with the increases in the sales of all food stores between the two census years and shows the percentages of the increased volume which were obtained by the chains.

Sales Increases of Food Chains to Sales Gains of All Stores,
by Size of Locality, 1941 over 1930

| Size of locality | Increases in sales (All food stores) | Increases in sales (food chains) | Per cent of increase obtained by food chains |
|------------------------|---|-------------------------------------|---|
| | \$ | \$ | % |
| CANADA, Total | 162,133,500 | 49,114,400 | 30.3 |
| 100,000 and over | 45,289,000 | 21,263,500 | 47.0 |
| 30,000 to 99,999 | 25,479,100 | 14,220,600 | 55.8 |
| 10,000 to 29,999 | 19,480,100 | 6,891,600 | 35.4 |
| Under 10,000 | 71,885,300 | 6,738,700 | 9.4 |

On a Canada-wide basis nearly a third of the increase in sales volume between the two years was obtained by the food chains, but as will be observed, this ratio was by no means typical of the experiences of chain outlets in the different size-of-locality groups.

Age of Food Chain Outlets

The census questionnaire asked the various chain organizations to classify their stores in operation in 1941 according to their date of acquisition, using for this purpose broad date groupings rather than individual years. A few firms were unable to provide this information, either in whole or in part but dates of acquisition were secured for 1,659 of the 1,707 units of food chains operating in 1941 and are shown on a provincial basis in Table 7. The basis of classification was the date on which the individual units came under their present ownership at their locations on the census date. The data are therefore unaffected by any renovations without change of location made during the existence of many unit stores.

Of the 1,659 stores whose ages were reported, 96 or 5.8 per cent were opened some time during the census year; another 249 units or 15.0 per cent were opened in the three-year period between 1938 and 1940; 319 or 19.2 per cent between 1934 and 1937; 20.7 per cent of the total number were opened between 1930 and 1933; 36.5 per cent between 1920 and 1929; and only 46 units or 2.8 per cent of the total were opened in 1919 or earlier. On the basis of these figures, the average age of all the food chain units operating in 1941 may be estimated at approximately ten years.

The information available does not show the total number of openings or closings during the intercensal period nor does it provide a basis for computing the life expectancy of individual chain stores. Nevertheless, some interesting results may be derived from an examination of the age analyses for the two census periods.

In 1930, according to the first complete Census of Merchandising, there were 2,352^x chain food stores in Canada. Of this number 134^x could not be classified according to age, while another 336 units had been opened in 1930. There were thus 1,882 units in operation in 1930 which were opened in 1929 or in earlier years. A considerable portion of the unclassified 134 units could also be added to this category. But the analysis from the 1941 Census according to age shows that only 652 stores operating in 1941 were opened in 1929 or prior to that date. Thus,

^x Revised.

at least 1,230 stores or 65.3 per cent of the total number established prior to 1930 and operating in that year had been closed during the intercensal period.

This subject may be approached from another angle. There were 2,352 food chain stores in operation in 1930 according to the results of the 1930 Census. The analysis by age of the stores operating in 1941 shows 343 of these stores opened between 1930 and 1933. Assuming that perhaps one-quarter or about 80 of these 343 stores active in 1941 were opened in 1930 alone, it may be estimated that 263 of the stores operating in 1941 were opened between 1931 and 1933. According to Table 7 another 664 of the stores in operation in 1941 were opened between 1934 and 1941. There were thus at least 927 (263 + 664) additions to the food chain store field between 1931 and 1941, which, when added to the 2,352 stores in operation in 1930, yields a total of 3,279 which would be the number in operation in 1941 had there been no closures. But there were only 1,707 units in operation in 1941 so that closures must have numbered at least 1,572. Obviously this figure also understates the number of closures because no allowance is made here for the stores which both opened and closed during the intercensal period and, therefore, do not appear in the analysis of the results for either of the two years. Nevertheless, it is apparent that a major turnover in the number of stores used by the food chains occurred between the two Census periods.

On a provincial basis, the number of stores operated by the food chains increased between 1930 and 1941 from 244 to 280 units in British Columbia and from 67 to 95 outlets in Nova Scotia; decreases were largest in Ontario, Quebec, and Saskatchewan, the reduction amounting to 317 stores, 281 stores, and 54 stores for the respective provinces. By size-of-locality groups, decreases in numbers and percentage reductions between 1930 and 1941 are as follows: Over 100,000 population, 359 stores or 34.7 per cent; 30,000 to 99,999 population, 93 units or 28.2 per cent; 10,000 to 29,999 population; 118 outlets or 35.3 per cent; up to 10,000 population, 76 stores or 11.6 per cent.

Closures of stores were made by all three kinds of food chains during the intercensal period, the reductions in the number of stores operated amounting to 301 outlets for the grocery chains, 286 units for the combination chains, and 59 stores for the meat and fish market chains. Combination chains increased the number of active combination units from 698 outlets in 1930 to 762 in 1941, and reduced the number of grocery stores from 665 to 323 outlets between the two years.

It is probable that the more recently opened outlets of the food chains were located and equipped to provide substantially larger individual store sales than the average sales per store prevailing earlier. Thus, calculations from the figures contained in Table 4 reveal that average sales per unit, including all three kinds of chain stores, increased from \$44,000 in 1934 to \$53,000 in 1937 and to \$104,000 in 1941, a percentage increase of almost 100 per cent between the two latter years. In addition, the number of stores with sales volumes of \$100,000 and over increased from 225 in 1937 to 529 in 1941, a gain of 304 units which compares with the 345 outlets established in the years 1938 to 1941 inclusive.

Credit Sales

Credit sales made by the food chains in 1941 are shown in Table 2. These sales have been estimated from the percentage ratios of credit to total sales which the firms reported in their Census schedules. Of the 79 food chains in operation in 1941, 62 firms having total sales of \$106,140,400 reported credit sales estimated at \$11,628,200, or 10.9 per cent of the total net sales of such organizations. Since sales at wholesale comprised a minor part of the total dollar volume, the credit sales of the food chains were made principally to their retail customers. Overall, only a slight increase in the ratios of total credit

to total sales has occurred between 1930 and 1941, the percentages being 4 per cent and 6 per cent respectively.

Employment in Food Chain Stores

According to the data contained in Table 2, the retail outlets of the food chains furnished employment in 1941 to 9,613 full-time store employees, of which slightly over 7,000 were male workers. Part-time store employees of these chain stores numbered 5,102 workers in 1941, of which about 4,300 were male. Salaries and wages distributed to full-time store employees in 1941 amounted to over \$9,900,000, and slightly over \$1,200,000 was paid to part-time store employees.

Sales per full-time store employee as a measure of the productivity of such workers is affected by the presence of a number of variables in operating conditions. Thus, retail sales are a composite of such factors as the number of transactions, prices, and total quantities of foodstuffs handled. Distribution of store volume between packaged and bulk commodities has certain relationships to the total number of employees required. In addition, the types of stores operated by the different chains, whether service or self-service, combination or grocery, the presence or absence of credit and delivery services, and the factor of working proprietors in the smaller chains have unmeasurable influences on the selling results of chain store employees.

Average sales per full-time store employee of the different kinds of food chains in 1941 are as follows:

| | |
|-----------------------------------|-----------|
| All food chains | \$ 18,500 |
| Grocery chains | \$ 14,600 |
| Combination chains | \$ 20,000 |
| Meat and fish market chains | \$ 9,900 |

Truer ratios of sales to store employees would be obtained by classifying sales and store employees by kinds of stores rather than by kinds of chains and then breaking down the resulting data between service and self-service stores. Unfortunately, however, the necessary statistics are not immediately available for such purposes.

Commodities Sold by Food Chains

Commodities sold by grocery, combination, and meat and fish market chains in 1941 are presented in Tables 8, 9 and 10. These data have been compiled from the reports of those food chains which were able to provide breakdowns of the commodity sales of their entire organizations, irrespective of the kinds of stores operated.

Since a number of the chains classified in this report as one kind of business operate other kinds-of-food stores in minor numbers, the percentage distributions of commodity sales shown in these tables are not typical commodity compositions of individual grocery, combination, or meat and fish market chain outlets. For example, Table 9 reveals that sales of fresh and cooked meats including poultry and fish comprised 18.97 per cent of the sales of the combination chains whose sales were classifiable by commodities. Sales of the grocery units of the combinations, which do not include sales of fresh meats, however, comprised about 13 per cent of the total dollar volume of these firms in 1941. The percentage of meats, poultry and fish sold by the combination units of these companies would, therefore, be somewhat larger than the 18.97 per cent mentioned above.

The commodity coverage, or the percentage of the total sales made by the food chains which was also reported by groups of commodities was comparatively high. Thus, 74.83 per cent of the sales of the grocery chains, 97.74 per cent of the sales of the combination chains, and 96.44 per cent of the sales of the meat and fish market chains were analyzed by commodities.

Expenses of the Food Chains

Operating expenses of grocery, combination and meat and fish market chains in 1941 are shown in Table 2. This table summarizes data on sales, store employment and payroll, chain expenses, rentals, inventories and credit sales for all chains and for each of the three kinds of business. Tables 11, 12 and 13 present similar statistics for grocery, combination, and meat and fish market chains, classified by size of business.

Expense data are shown in these tables as dollar totals and as percentage ratios of these expenses to the total sales of the chains comprising the different groups. The expense percentages are therefore weighted averages or, in other words, these ratios are directly and proportionately influenced by the varying sizes of the different organizations included in the various classifications. As a result, one or several important chains operating under conditions not typical of food chains as a whole may exert influences on the average percentage relationships shown in these tables not proportional to the numerical importance of such organizations.

The reporting schedules used in the Census of Merchandising in obtaining data from the food chains for 1941 provided statistics on store expenses, overhead expenses, and warehouse expenses. Store expenses were shown under wage cost, rentals paid, and other store expenses excluding rentals. No breakdowns of overhead expenses or of warehouse expenses, however, were required by the schedules.

The functional breakdown of expenses between store, overhead, and warehouse expenses, may have been at variance with the head office accounting records of some food chains which may group their expense items by natural divisions, irrespective of the sources of these operating costs. Under the latter method of classifying expenses, figures for such items as salaries and wages, depreciation, heat, light and power, for example, would be developed for the entire organization rather than for its administrative and different operating divisions. Such chains would, therefore, find it necessary to pro-rate their expenses by various methods to the three major expense classifications used in the Bureau's schedules.

A third qualification necessary to the interpretation of these expense ratios arises from variations between chains in respect to the presence or absence of central warehouses. Differing policies of procuring and distributing merchandise to the store outlets must also be considered. Thus, at least some of those chains operating relatively few retail outlets with fairly small individual store volumes may have relied upon wholesalers to service these units; conversely, some chains with comparatively few outlets having large store volumes may have supplied these stores through drop shipments direct from manufacturers to the individual chain units. Likewise, the large food chains may have used the technique of drop shipments to supplement their warehouse facilities or to service those stores which are located some distance from the central warehouses. Since total sales of the food chains apply to those with and without central warehouses, while warehouse expenses are confined to only those firms operating warehouses, the ratios of warehouse expenses to total sales may in some instances understate the expense experiences of some of those chains with central warehouses.

Grocery Chain Operating Expenses

Total operating expenses of the grocery chains in 1941 are presented in Table 11. Columns 2 and 3 of this table present the operating statistics of those chains operating less than 25 units in 1941, and of those firms which operated 25 or more units. Columns 4 and 5 present similar data for the grocery chains classified between those which operate only grocery stores and those with grocery and other kinds of stores. Most of the other stores consisted of combination food units, although a few miscellaneous kinds of business are included.

It is probable that those chains which in 1941 operated combination stores as a minor proportion of their total retail outlets appear in the classifications principally among those firms which operated less than 25 units in 1941, as well as among those chains which operated both grocery and other stores. Average store sales for chains with less than 25 units in 1941 amounted to \$75,801 and for chains operating both grocery and combination stores, average sales amounted to \$85,655 per retail outlet. Average sales for both of these classifications were substantially in excess both of those chains with 25 units or more, and of those firms operating straight grocery stores.

Total operating expenses of all grocery chains in 1941 averaged 13.84 per cent of total sales. Considerable variations in the expense experiences of these chains are apparent, however, when the grocery chains are first classified by numbers of units operated, and then classified between those which operated grocery stores only and those with both grocery and other kinds of stores. Thus, 23 grocery chains operating less than 25 units per firm in 1941 and with average sales of \$75,800 per store, obtained an overall expense ratio of 12.65 per cent of total sales; the remaining 5 chains, operating 25 or more units with average store volume of \$44,294, however, realized a total expense ratio of 15.69 per cent of total sales. When these grocery chains were classified according to kinds of stores operated, the 12 chains operating 164 grocery and other kinds of units (principally combination food outlets) with average store volume of \$85,655, obtained a total expense ratio of 13.03 per cent of sales, while the firms operating only grocery stores with about half of the average store volume of the former group had total expenses averaging the higher figure of 14.75 per cent of sales.

Total store expenses amounted to 11.30 per cent of sales for those chains operating less than 25 units and this compares with a store expense ratio of 13.13 per cent of sales for those firms which operated 25 units or more in 1941. Store wages, rentals paid on leased premises and other store expenses varied similarly. Overhead expenses, reflecting the smaller average number of stores operated per chain, were lower for those firms with less than 25 units than for those grocery chains which maintained 25 or more retail outlets in 1941. Warehouse expense ratios were likewise lower for the first group of chains than for those operating 25 units or more but this may be due to the operation of fewer central warehouses by the smaller grocery chains. Indeed average sales per firm averaged about \$700,000 for the smaller group of grocery chains as compared with average sales of \$2,104,000 for the larger grocery chains.

Although the average sales per store of those chains operating both grocery and other kinds of stores were nearly twice the average sales per unit of the chains operating only grocery units, the total store expense ratio of the former group was only slightly below that of the straight grocery store chains. Reflecting in part the higher store volumes, both store wage cost and rentals

paid on store premises as percentages of sales were less in the case of the firms operating both grocery and other stores than for those operating only grocery store outlets. On the other hand, other store expenses excluding rentals amounted to 4.6 per cent for the chains with both grocery and other stores and only 3.6 per cent for the straight grocery chains.

Overhead expenses averaged 0.45 per cent of total sales in 1941 for the chains operating both grocery and other units, considerably lower than the 1.54 per cent of sales experienced by the straight grocery chains. This difference apparently was due to the fewer grocery and other stores operated by the average chains in this classification, the straight grocery chains maintaining on the average a somewhat larger number of stores. Warehouse expenses as a percentage of total sales also averaged lower for the firms with both grocery and other retail outlets, reflecting in part the operation of fewer central warehouses by these chains.

Combination Chains Operating Expenses

Total operating expenses of the 34 combination food chains, as presented in Table 2, averaged 13.48 per cent of total sales in 1941, while store expenses, overhead, and warehouse expenses amounted to 10.94 per cent, 1.40 per cent, and 1.14 per cent of total sales. These ratios, however, are by no means uniform when the combination chains are classified by number of units operated. Thus, the 28 combination chains with less than 25 units operated 181 stores, or an average of about 7 outlets to the chain, experienced average sales of about \$84,400 per unit, and obtained a total operating expense ratio of 15.56 per cent of sales. The remaining 6 combination chains were definitely larger, operating an average of 152 outlets per chain with average sales of \$144,700 per store, and these chains achieved the lower total expense ratio of 13.24 per cent of sales.

The fact that the 6 larger combination chains obtained a considerably lower total expense ratio than the 28 smaller combination chains is caused by more favourable expense experiences in the operation of the retail outlets. Thus, store wage cost amounted to 5.73 per cent for the larger chains and 7.92 per cent of total sales for the smaller organizations; rentals paid on leased store premises were 1.21 per cent of sales for the larger and 1.66 per cent for the smaller chains; and other store expenses exclusive of rentals paid averaged 3.68 per cent of total sales for the larger and 5.46 per cent for the smaller combinations. The fact that the average store volumes of the 6 larger combinations in 1941 substantially exceeded the average store sales of the smaller chains bears a significant relationship to these comparisons.

The smaller combination chains, however, obtained decidedly lower overhead and warehouse expense ratios in 1941 than the six larger combinations. Overhead expenses, as a percentage of sales, would naturally tend to be lower for the smaller chains which operated on the average about 7 stores per firm than for the larger organizations operating an average of 152 outlets per chain in 1941. Probably relatively fewer central warehouses were operated by the small firms than by the large chains in that year. Since total warehouse expenses were expressed as percentages of total sales to obtain the warehouse expense ratios shown in this table, the warehouse expense percentages for the small chains is weighted downward by the fact that total sales for these firms includes the dollar volume of a number of small chains which reported no warehouse expenses.

Operating Expenses of Meat and Fish Market Chains

Operating expenses of all meat and fish market chains in 1941 are presented in Table 13, accompanied by analyses of these expenses for those chains having less than 15 units and those operating 15 or more stores.

Total operating expenses for all meat and fish market chains averaged 21.37 per cent of sales in 1941. Those chains with less than 15 units, averaging about 6 units to the chain and with average sales of \$41,861 per outlet, obtained a total expense ratio of 19.40 per cent of sales. On the other hand, the 3 companies operating 15 or more stores in 1941, an average of about 28 stores to the chain, had average sales of \$19,446 per unit and experienced a total operating expense ratio of the larger figure of 25.60 per cent.

The variation in total store expense ratios between the two size groups was principally responsible for the difference between the total expense percentages of the two classifications of chains. Reflecting the larger average store volume of the 14 organizations with less than 15 units, store expenses averaged 18.42 per cent of sales for these meat and fish market chains compared with 22.23 per cent of sales for the chains with 15 or more outlets. Wage cost, rentals paid on leased premises, and other store expenses varied in a similar manner.

Overhead expenses were also lower for the chains operating less than 15 units than for those with the larger number of stores. Warehouse expenses were very low for the firms with less than 15 units in 1941, and apparently only a few central warehouses were operated by the chains in this classification. No warehouse expenses were reported by the 3 chains which each operated 15 or more outlets in 1941.

Middle Range Figures

The expense ratios shown in Tables 2, 11, 12 and 13, were obtained by totalling the expenses reported by each chain and expressing the totals as percentages of the total sales of these companies. These percentages are therefore weighted averages in that the experiences of the larger companies exert proportionately greater influences upon the ratios than those of the smaller firms. Other averages developed in this report are weighted proportionately by the same factors. These averages, while presenting the overall positions of the different groups of food chains and the composite results of all food chains, may be influenced by special circumstances relating to several of the larger chain companies. In such cases, the averages would not represent the typical experiences of the majority of the chain organizations.

To overcome these difficulties, "middle range" figures were developed for total sales of the different chains, average sales per store, average salary per full-time store employee, average yearly retail sales per full-time store employee, and for the various operating expenses of the three kinds of food chains. To compute these "middle range" figures, the above items were calculated for each company, the various expenses for each chain being expressed as percentages of the sales of that firm. Each set of ratios was then arranged in ascending order of magnitude independently of the other ratios. The figures were then divided into three ranges: the lower range consisting of the lower 25 per cent of the number of ratios; the upper range consisting of the upper 25 per cent of the number of ratios; and the middle range containing the remaining half of the figures. Both the lower and the upper quarters of the

arrays of the different ratios were then discarded. Thus, after omitting the extremely high and extremely low values contained in the first and fourth quarters of the items, the remaining items were given equal weight in obtaining ratios on operating results.

The "Lower Limit of the Middle Range" and the "Upper Limit of the Middle Range" are the two values at either end of the middle groups of ratios. The "Median" is the value found midway between the upper and lower limits of the middle range. Thus the lower limit of the middle range for the total expenses of grocery chains is shown in Table 14 at 13.3 per cent of total sales, the upper limit at 16.7 per cent, and the median at 14.6 per cent of total sales. One-quarter of all grocery chain firms therefore obtained total chain operating expenses of less than 13.3 per cent of total sales; one-quarter of the firms had total expense ratios of more than 16.7 per cent of total sales, while the average total expense ratio of the intermediate half of these firms amounted to 14.6 per cent of total sales. The same explanation, of course, may be made for other items in this table.

In interpreting the middle range figures, 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 ratios in any column in the middle range table cannot be related to other ratios in the same column. To illustrate, the upper limit of the middle range for average sales per store of combination chains was \$111,700, and the similar figure for total store expenses was 17.0 per cent of total sales. Obviously, these values cannot be related since chains with high average sales per unit usually have comparatively low store expense ratios.

Reference was made earlier to the fact that the percentages found in Tables 2, 11, 12 and 13 were weighted averages in that they reflected the influences of the larger chains. Comparisons of the ratios in these tables with those contained in Table 14 will illustrate these differences. Thus, total operating expenses of grocery chains according to Tables 2 and 11 amounted to 13.84 per cent of total sales. The middle range for this item as shown in Table 14, however, extended between 13.3 and 16.7 per cent of total sales; the median standing at 14.6 per cent of total sales.

Table 1.—Food Chains, Grocery Combination and Meat Market Chains

(Number of chains, chain stores, chain sales and total sales, 1930 and 1941)

| | 1930 | 1941 | % change in sales 1941/1930 |
|-------------------------------------|---------------|---------------|-----------------------------------|
| CANADA-- | | | |
| No. of chains | 87 | 79 | |
| No. of stores (maximum) | 2,352 | 1,707 | |
| Chain sales | \$127,582,500 | \$177,405,900 | + 39.1 |
| Total sales | \$488,429,600 | \$647,442,900 | + 32.6 |
| % chain sales to total | 26.1 | 27.4 | |
| Average sales per chain store | \$ 54,244 | \$ 103,928 | + 91.6 |
| British Columbia (1) -- | | | |
| No. of chains | 19 | 14 | |
| No. of stores (maximum) | 246 | 282 | |
| Chain sales | \$ 10,194,900 | \$ 18,765,300 | + 84.1 |
| Total sales | \$ 37,425,600 | \$ 54,646,300 | + 46.0 |
| % chain sales to total | 27.2 | 34.3 | |
| Average sales per chain store | \$ 41,443 | \$ 66,544 | + 60.6 |
| Alberta -- | | | |
| No. of chains | 8 | 8 | |
| No. of stores (maximum) | 120 | 103 | |
| Chain sales | \$ 5,587,000 | \$ 7,932,100 | + 42.0 |
| Total sales | \$ 23,469,400 | \$ 30,521,800 | + 30.0 |
| % chain sales to total | 23.8 | 26.0 | |
| Average sales per chain store | \$ 46,558 | \$ 77,011 | + 65.4 |
| Saskatchewan -- | | | |
| No. of chains | 10 | 4 | |
| No. of stores (maximum) | 165 | 111 | |
| Chain sales | \$ 6,969,300 | \$ 6,794,100 | - 2.5 |
| Total sales | \$ 21,690,500 | \$ 22,955,000 | + 5.8 |
| % chain sales to total | 32.1 | 29.6 | |
| Average sales per chain store | \$ 42,238 | \$ 61,208 | + 44.9 |
| Manitoba -- | | | |
| No. of chains | 8 | 4 | |
| No. of stores (maximum) | 121 | 85 | |
| Chain sales | \$ 5,689,100 | \$ 8,247,500 | + 45.0 |
| Total sales | \$ 22,225,200 | \$ 28,786,800 | + 29.5 |
| % chain sales to total | 25.6 | 28.7 | |
| Average sales per chain store | \$ 47,017 | \$ 97,029 | +106.4 |
| Ontario -- | | | |
| No. of chains | 37 | 41 | |
| No. of stores (maximum) | 1,107 | 790 | |
| Chain sales | \$ 70,769,300 | \$ 99,318,600 | + 40.3 |
| Total sales | \$206,749,300 | \$261,988,000 | + 26.7 |
| % chain sales to total | 34.2 | 37.9 | |
| Average sales per chain store | \$ 63,929 | \$ 125,720 | + 96.7 |
| Quebec -- | | | |
| No. of chains | 13 | 7 | |
| No. of stores (maximum) | 495 | 214 | |
| Chain sales | \$ 23,708,400 | \$ 28,477,200 | + 20.1 |
| Total sales | \$140,527,500 | \$190,004,000 | + 35.2 |
| % chain sales to total | 16.9 | 15.0 | |
| Average sales per chain store | \$ 47,896 | \$ 133,071 | +177.8 |

(1) Includes Yukon and Northwest Territories.

Table 1.--Food Chains, Grocery Combination and Meat Market Chains--(Concl'd)

(Number of chains, chain stores, chain sales and total sales, 1930 and 1941)

| | 1930 | 1941 | % change in sales 1941/1930 |
|-------------------------------------|---------------|---------------|-----------------------------------|
| Maritime Provinces -- | | | |
| No. of chains | 12 | 17 | |
| No. of stores (maximum) | 98 | 122 | |
| Chain sales | \$ 4,664,500 | \$ 7,871,100 | + 68.7 |
| Total sales | \$ 36,342,100 | \$ 58,541,000 | + 61.1 |
| % chain sales to total | 12.8 | 13.4 | |
| Average sales per chain store | \$ 47,596 | \$ 64,517 | + 35.6 |

Table 2.--Food Chains--Principal Statistics, Grocery, Combination and Meat and Fish Market Chains, 1941

| | All Chains | Grocery store chains | Combination store chains | Meat and fish market chains |
|---|---------------|----------------------------|--------------------------------|-----------------------------------|
| A. Number of chains | 79 | 28 | 34 | 17 |
| B. Number of stores | 1,707 | 448 | 1,093 | 166 |
| C. Sales -- | | | | |
| 1. Retail sales through stores .. | \$177,405,900 | 26,523,300 | 145,794,100 | 5,088,500 |
| 2. Wholesale sales to other firms | \$ 1,725,000 | 153,700 | 1,571,300 | - |
| 3. Total chain sales | \$179,130,900 | 26,677,000 | 147,365,400 | 5,088,500 |
| D. Store employment and payroll -- | | | | |
| Full-time employees -- | | | | |
| 1. Male employees, number | 7,020 | 1,262 | 5,277 | 481 |
| 2. Female employees, number .. | 2,593 | 553 | 2,007 | 33 |
| 3. Salaries and wages | \$ 9,934,200 | 1,584,600 | 7,820,600 | 529,000 |
| Part-time employees -- | | | | |
| 1. Male employees, number | 4,326 | 696 | 3,414 | 216 |
| 2. Female employees, number .. | 776 | 181 | 586 | 9 |
| 3. Salaries and wages | \$ 1,222,200 | 199,200 | 961,100 | 61,900 |
| E. Chain expenses -- | | | | |
| Store expenses -- | | | | |
| 1. Wage cost Amount | \$ 11,156,400 | 1,783,800 | 8,781,700 | 590,900 |
| 2. Per cent of total sales | 6.23 | 6.69 | 5.96 | 11.61 |
| 3. Other expenses -- including rent Amount | \$ 9,192,100 | 1,422,900 | 7,345,100 | 424,100 |
| 4. Per cent of total sales | 5.13 | 5.33 | 4.98 | 8.34 |
| 5. Total store expenses Amount | \$ 20,348,500 | 3,206,700 | 16,126,800 | 1,015,000 |
| 6. Per cent of total sales | 11.36 | 12.02 | 10.94 | 19.95 |
| Overhead expenses Amount | \$ 2,393,600 | 256,400 | 2,068,000 | 69,200 |
| Per cent of total sales | 1.33 | 0.96 | 1.40 | 1.36 |
| Warehouse expenses Amount | \$ 1,910,500 | 230,300 | 1,677,100 | 3,100 |
| Per cent of total sales | 1.07 | 0.86 | 1.14 | 0.06 |
| Total chain expenses Amount | \$ 24,652,600 | 3,693,400 | 19,871,900 | 1,087,300 |
| Per cent of total sales | 13.76 | 13.84 | 13.48 | 21.37 |

Table 2.--Food Chains--Principal Statistics, Grocery, Combination and Meat and Fish Market Chains, 1941--(Concl'd)

| | All Chains | Grocery store chains | Combination store chains | Meat and fish market chains |
|--|---------------|----------------------|--------------------------|-----------------------------|
| F. Rentals -- | | | | |
| 1. Number of stores in leased premises | 1,547 | 429 | 989 | 129 |
| 2. Sales of stores in leased premises | \$157,824,400 | 22,498,500 | 131,121,000 | 4,204,900 |
| 3. Rentals paid Amount | \$ 2,072,000 | 326,200 | 1,641,900 | 103,900 |
| 4. Per cent of sales in leased premises | 1.31 | 1.45 | 1.25 | 2.47 |
| G. Inventories, end of 1941 -- | | | | |
| 1. Store inventories | \$ 7,386,800 | 1,831,600 | 5,439,200 | 116,000 |
| 2. Warehouse inventories | \$ 5,758,900 | 1,290,700 | 4,465,000 | 3,200 |
| 3. Total inventories | \$ 13,145,700 | 3,122,300 | 9,904,200 | 119,200 |
| H. Customers' accounts outstanding | | | | |
| Per cent of total sales | 0.61 | 1.41 | 0.38 | 2.98 |
| I. Credit Sales -- | | | | |
| 1. Number of chains reporting credit sales | 62 | 21 | 28 | 13 |
| 2. Total net sales of such chains | \$106,140,400 | 19,552,800 | 82,596,600 | 3,991,000 |
| 3. Net credit sales of such chains | \$ 11,628,200 | 3,409,600 | 7,371,100 | 847,500 |
| 4. Ratio of credit sales to total sales | 10.96 | 17.44 | 8.92 | 21.24 |
| J. Cash Sales -- | | | | |
| Number of chains reporting they sell only for cash | 17 | 7 | 6 | 4 |
| Total net sales of such chains | \$ 73,086,900 | 7,220,600 | 64,768,800 | 1,097,500 |

Table 3.--GROCERY AND COMBINATION CHAINS--Kinds of Stores Operated for Chains
Classified by Size, 1941

| | Number of Chains | TOTAL UNITS | | GROCERY UNITS | | COMBINATION UNITS | | OTHER | |
|------------------------------------|------------------|-------------|-------------|---------------|------------|-------------------|-------------|--------|---------|
| | | Number | Sales | Number | Sales | Number | Sales | Number | Sales |
| GROCERY STORE CHAINS-- | | | | | | | | | |
| Total, all chains .. | 28 | 448 | 26,523,300 | 412 | 20,958,800 | 22 | 5,313,800 | 14 | 250,700 |
| Chains having: | | | | | | | | | |
| Less than 10 units | 17 | 94 | 4,906,600 | 83 | 3,966,700 | 7 | 864,500 | 4 | 75,400 |
| 10-99 units | 11 | 354 | 21,616,700 | 329 | 16,992,100 | 15 | 4,449,300 | 10 | 175,300 |
| More than 100 units | - | - | - | - | - | - | - | - | - |
| COMBINATION STORE CHAINS -- | | | | | | | | | |
| Total, all chains .. | 34 | 1,098 | 145,794,100 | 323 | 18,977,400 | 762 | 126,509,700 | 8 | 307,000 |
| Chains having: | | | | | | | | | |
| Less than 10 units | 27 | 162 | 14,345,300 | 31 | 1,562,900 | 123 | 12,475,400 | 8 | 307,000 |
| 10-99 units | 3 | 144 | 9,477,000 | 42 | 2,317,500 | 102 | 7,159,500 | - | - |
| More than 100 units | 4 | 787 | 121,971,800 | 250 | 15,097,000 | 537 | 106,874,800 | - | - |

Table 4.--FOOD CHAINS--Units Classified According to Amount of Annual Sales
(Grocery, meat and combination store chains combined)

| | 1934 | | | | 1937 | | | |
|-----------------------------|--------|----------------|-------------------|---------------------|--------|----------------|-------------------|---------------------|
| | Number | Sales | Per cent of total | Cumulative per cent | Number | Sales | Per cent of total | Cumulative per cent |
| CANADA, Total | 2,395 | \$ 104,912,800 | 100.00 | | 2,287 | \$ 121,054,800 | 100.00 | |
| \$1,000,000, and over | - | - | - | - | - | - | - | - |
| \$500,000 - \$999,999 | - | - | - | - | - | - | - | - |
| \$300,000 - \$499,999 | 1 | 302,700 | 0.29 | 0.29 | 14 | 4,959,800 | 4.10 | 4.10 |
| \$200,000 - \$299,999 | 24 | 5,639,700 | 5.38 | 5.67 | 54 | 12,874,600 | 10.64 | 14.74 |
| \$100,000 - \$199,999 | 127 | 16,843,900 | 16.06 | 21.73 | 157 | 21,721,100 | 17.94 | 32.68 |
| \$ 50,000 - \$ 99,999 | 566 | 38,138,600 | 36.35 | 58.08 | 612 | 41,514,500 | 34.29 | 66.97 |
| \$ 30,000 - \$ 49,999 | 594 | 23,164,600 | 22.08 | 80.16 | 625 | 24,408,900 | 20.16 | 87.13 |
| \$ 20,000 - \$ 29,999 | 543 | 13,529,700 | 12.90 | 93.06 | 414 | 10,268,700 | 8.48 | 95.61 |
| \$ 10,000 - \$ 19,999 | 413 | 6,631,300 | 6.32 | 99.38 | 289 | 4,584,000 | 3.79 | 99.40 |
| \$ 5,000 - \$ 9,999 | 69 | 506,800 | 0.48 | 99.86 | 73 | 570,600 | 0.47 | 99.87 |
| Less than \$ 5,000 | 58 | 155,500 | 0.14 | 100.00 | 49 | 152,600 | 0.13 | 100.00 |

| | 1941 | | | |
|-----------------------------|--------|----------------|-------------------|---------------------|
| | Number | Sales | Per cent of total | Cumulative per cent |
| CANADA, Total | 1,707 | \$ 177,405,900 | 100.00 | |
| \$1,000,000, and over | - | - | - | - |
| \$500,000 - \$999,999 | 38 | 23,203,400 | 13.08 | 13.08 |
| \$300,000 - \$499,999 | 110 | 42,868,000 | 24.16 | 37.24 |
| \$200,000 - \$299,999 | 100 | 24,292,400 | 13.69 | 50.93 |
| \$100,000 - \$199,999 | 281 | 39,456,800 | 22.24 | 73.17 |
| \$ 50,000 - \$ 99,999 | 351 | 24,445,400 | 13.78 | 86.95 |
| \$ 30,000 - \$ 49,999 | 395 | 15,448,000 | 8.71 | 95.66 |
| \$ 20,000 - \$ 29,999 | 202 | 5,076,800 | 2.86 | 98.52 |
| \$ 10,000 - \$ 19,999 | 144 | 2,156,000 | 1.22 | 99.74 |
| \$ 5,000 - \$ 9,999 | 48 | 352,700 | 0.20 | 99.94 |
| Less than \$ 5,000 | 38 | 106,400 | 0.06 | 100.00 |

Table 5.--Food Stores Classified by Size of Business and by Type of Operation

(Grocery, meat and combination stores)

| | TOTAL | | | | | |
|----------------------------|--------|-------------------|---------------------|----------------|-------------------|---------------------|
| | Stores | | | Sales | | |
| | Number | Per cent of total | Cumulative per cent | Amount | Per cent of total | Cumulative per cent |
| CANADA, Total | 32,523 | 100.0 | | \$ 647,442,900 | 100.0 | |
| \$1,000,000, and over ... | - | - | - | - | - | - |
| \$500,000 - \$999,999 | 43 | 0.1 | 0.1 | 26,459,000 | 4.1 | 4.1 |
| \$300,000 - \$499,999 ...) | 250 | 0.8 | 0.9 | 78,199,300 | 12.1 | 16.2 |
| \$200,000 - \$299,999 ...) | | | | | | |
| \$100,000 - \$199,999 | 536 | 1.6 | 2.5 | 72,593,400 | 11.2 | 27.4 |
| \$ 50,000 - \$ 99,999 | 1,631 | 5.0 | 7.5 | 109,081,800 | 16.8 | 44.2 |
| \$ 30,000 - \$ 49,999 | 2,970 | 9.1 | 16.6 | 112,949,300 | 17.4 | 61.6 |
| \$ 20,000 - \$ 29,999 | 3,506 | 10.8 | 27.4 | 84,712,700 | 13.1 | 74.7 |
| \$ 10,000 - \$ 19,999 | 6,608 | 20.3 | 47.7 | 93,528,700 | 14.4 | 89.1 |
| \$ 5,000 - \$ 9,999 | 6,318 | 19.5 | 67.2 | 45,186,300 | 7.0 | 96.1 |
| Less than \$ 5,000 | 10,661 | 32.8 | 100.0 | 24,732,400 | 3.9 | 100.0 |

Chains

| | \$ | | | | | |
|----------------------------|--------|-------------------|---------------------|-------------|-------------------|---------------------|
| | Number | Per cent of total | Cumulative per cent | Amount | Per cent of total | Cumulative per cent |
| CANADA, Total | 1,707 | 100.0 | | 177,405,900 | 100.0 | |
| \$1,000,000, and over ... | - | - | - | - | - | - |
| \$500,000 - \$999,999 | 38 | 2.2 | 2.2 | 23,203,400 | 13.1 | 13.1 |
| \$300,000 - \$499,999 | 110 | 6.5 | 8.7 | 42,868,000 | 24.1 | 37.2 |
| \$200,000 - \$299,999 | 100 | 5.9 | 14.6 | 24,292,400 | 13.7 | 50.9 |
| \$100,000 - \$199,999 | 281 | 16.5 | 31.1 | 39,456,800 | 22.2 | 73.1 |
| \$ 50,000 - \$ 99,999 | 351 | 20.6 | 51.7 | 24,445,400 | 13.8 | 86.9 |
| \$ 30,000 - \$ 49,999 | 395 | 23.1 | 74.8 | 15,448,000 | 8.7 | 95.6 |
| \$ 20,000 - \$ 29,999 | 202 | 11.8 | 86.6 | 5,076,800 | 2.9 | 98.5 |
| \$ 10,000 - \$ 19,999 | 144 | 8.4 | 95.0 | 2,156,000 | 1.2 | 99.7 |
| \$ 5,000 - \$ 9,999 | 48 | 2.8 | 97.8 | 352,700 | 0.2 | 99.9 |
| Less than \$ 5,000 | 38 | 2.2 | 100.0 | 106,400 | 0.1 | 100.0 |

Independents

| | \$ | | | | | |
|----------------------------|--------|-------------------|---------------------|-------------|-------------------|---------------------|
| | Number | Per cent of total | Cumulative per cent | Amount | Per cent of total | Cumulative per cent |
| CANADA, Total | 30,816 | 100.0 | | 470,037,000 | 100.0 | |
| \$1,000,000, and over ... | - | - | - | - | - | - |
| \$500,000 - \$999,999 | 5 | - | - | 3,255,600 | 0.7 | 0.7 |
| \$300,000 - \$499,999 ...) | 40 | 0.1 | 0.1 | 11,038,900 | 2.4 | 3.1 |
| \$200,000 - \$299,999 ...) | | | | | | |
| \$100,000 - \$199,999 | 255 | 0.8 | 0.9 | 33,136,600 | 7.1 | 10.2 |
| \$ 50,000 - \$ 99,999 | 1,280 | 4.2 | 5.1 | 84,636,400 | 18.0 | 28.2 |
| \$ 30,000 - \$ 49,999 | 2,575 | 8.4 | 13.5 | 97,501,300 | 20.8 | 49.0 |
| \$ 20,000 - \$ 29,999 | 3,304 | 10.7 | 24.2 | 79,635,900 | 16.9 | 65.9 |
| \$ 10,000 - \$ 19,999 | 6,464 | 21.0 | 45.2 | 91,372,700 | 19.4 | 85.3 |
| \$ 5,000 - \$ 9,999 | 6,270 | 20.3 | 65.5 | 44,833,600 | 9.5 | 94.8 |
| Less than \$ 5,000 | 10,623 | 34.5 | 100.0 | 24,626,000 | 5.2 | 100.0 |

Table 6.--FOOD CHAINS--Stores and Sales Classified by Provinces and Size of Locality, 1941

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

| Province | All Localities | | | Stores and sales in places with population of -- | | | | | |
|---------------------------------------|----------------|-------------------|--------|--|----------------|-------------------------------|------------------|----------------|-------------------------------|
| | No. of Stores | Total Chain Sales | | No. of Stores | Over 100,000 | | 30,000 - 100,000 | | |
| | | Value | % | | Value of sales | Per cent of total chain sales | No. of Stores | Value of sales | Per cent of total chain sales |
| CANADA, Total | 1,707 | \$ 177,405,900 | 100.00 | 677 | \$ 78,376,200 | 44.18 | 236 | \$ 30,572,700 | 17.23 |
| Yukon and Northwest Territories | 2 | (x) | 100.00 | - | - | - | - | - | - |
| British Columbia | 280 | (x) | 100.00 | 141 | 9,641,100 | 51.68 | 12 | 1,820,800 | 9.76 |
| Alberta | 103 | 7,932,000 | 100.00 | - | - | - | 61 | 5,278,400 | 66.54 |
| Saskatchewan | 111 | 6,794,200 | 100.00 | - | - | - | 38 | 3,283,200 | 48.33 |
| Manitoba | 85 | 8,247,300 | 100.00 | 66 | 5,987,100 | 72.59 | - | - | - |
| Ontario | 790 | 99,318,900 | 100.00 | 355 | 46,280,500 | 46.60 | 63 | 11,905,400 | 11.99 |
| Quebec | 214 | 28,477,200 | 100.00 | 115 | 16,467,500 | 57.83 | 31 | 5,562,300 | 19.53 |
| New Brunswick | 26 | (x) | 100.00 | - | - | - | 8 | 764,900 | 47.83 |
| Nova Scotia | 95 | 6,163,000 | 100.00 | - | - | - | 23 | 1,957,700 | 31.76 |
| Prince Edward Island | 1 | (x) | 100.00 | - | - | - | - | - | - |

| Province | Stores and sales in places with population of -- | | | | | | | | |
|---------------------------------------|--|----------------|-------------------------------|-----------------|----------------|-------------------------------|-----------------|----------------|-------------------------------|
| | 10,000 to 30,000 | | | 1,000 to 10,000 | | | Less than 1,000 | | |
| | No. of Stores | Value of sales | Per cent of total chain sales | No. of Stores | Value of sales | Per cent of total chain sales | No. of Stores | Value of sales | Per cent of total chain sales |
| CANADA, Total | 216 | \$ 30,375,700 | 17.12 | 389 | \$ 28,977,500 | 16.33 | 189 | \$ 9,103,800 | 5.13 |
| Yukon and Northwest Territories | - | - | - | - | - | - | 2 | (x) | (x) |
| British Columbia | 20 | (x) | (x) | 53 | 3,380,400 | 18.12 | 54 | (x) | (x) |
| Alberta | 5 | 1,003,200 | 12.65 | 18 | 1,051,600 | 13.26 | 19 | 598,800 | 7.55 |
| Saskatchewan | 13 | 1,134,500 | 16.70 | 25 | 1,739,700 | 25.60 | 35 | 636,800 | 9.37 |
| Manitoba | 5 | 853,900 | 10.35 | 7 | 730,600 | 8.86 | 7 | 675,700 | 8.12 |
| Ontario | 114 | 19,985,100 | 20.12 | 200 | 16,701,000 | 16.81 | 58 | 4,446,900 | 4.48 |
| Quebec | 29 | 3,353,400 | 11.78 | 39 | 3,094,000 | 10.86 | - | - | - |
| New Brunswick | 4 | (x) | (x) | 9 | 419,100 | 26.20 | 5 | (x) | (x) |
| Nova Scotia | 25 | 1,997,000 | 32.41 | 38 | 1,861,100 | 30.20 | 9 | 347,200 | 5.63 |
| Prince Edward Island | 1 | (x) | (x) | - | - | - | - | - | - |

Table 7.--Food Chains--Chain Units Classified by Provinces and Date of Establishment

| | CANADA Total | Yukon and Northwest Territories | British Columbia | Alberta | Sask- atchewan | Manitoba | Ontario | Quebec | New Brunswick | Nova Scotia | Prince Edward Island |
|--|-----------------|---------------------------------------|---------------------|---------|-------------------|----------|---------|--------|------------------|----------------|----------------------------|
| TOTAL UNITS--Number | 1,707 | 2 | 280 | 103 | 111 | 85 | 790 | 214 | 26 | 95 | 1 |
| Units not classified as to date of estab- lishment -- Number | 48 | - | - | - | - | - | 27 | 13 | - | 8 | - |
| Units classified as to date of estab- lishment -- Number | 1,659 | 2 | 280 | 103 | 111 | 85 | 763 | 201 | 26 | 87 | 1 |
| Per cent | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| 1941- Number | 96 | - | 43 | 2 | 4 | 4 | 23 | 15 | 1 | 4 | - |
| % of total classified ... | 5.8 | - | 15.4 | 1.9 | 3.6 | 4.7 | 3.0 | 7.5 | 3.8 | 4.6 | - |
| 1938- Number | 249 | - | 49 | 10 | 13 | 11 | 122 | 26 | 4 | 14 | - |
| 1940 % of total classified ... | 15.0 | - | 17.5 | 9.7 | 11.7 | 12.9 | 16.0 | 12.9 | 15.4 | 16.1 | - |
| 1934- Number | 319 | - | 50 | 18 | 17 | 9 | 87 | 112 | 10 | 15 | 1 |
| 1937 % of total classified ... | 19.2 | - | 17.9 | 17.5 | 15.3 | 10.6 | 11.4 | 55.7 | 38.5 | 17.2 | 100.0 |
| 1930- Number | 343 | - | 88 | 25 | 23 | 16 | 129 | 29 | 9 | 24 | - |
| 1933 % of total classified ... | 20.7 | - | 31.4 | 24.3 | 20.7 | 18.8 | 16.9 | 14.4 | 34.6 | 27.6 | - |
| 1920- Number | 606 | 2 | 47 | 39 | 51 | 45 | 374 | 19 | 2 | 27 | - |
| 1929 % of total classified ... | 36.5 | 100.0 | 16.8 | 37.9 | 46.0 | 53.0 | 49.0 | 9.5 | 7.7 | 31.0 | - |
| Before Number | 46 | - | 3 | 9 | 3 | - | 28 | - | - | 3 | - |
| 1920 % of total classified ... | 2.8 | - | 1.0 | 8.7 | 2.7 | - | 3.7 | - | - | 3.5 | - |

Table 8.--Grocery Store Chains--Sales by Commodities, 1941

| | \$ | % |
|---|------------|--------|
| Total retail sales, grocery chains | 26,523,300 | 100.00 |
| Less amount not classified by commodities | 6,675,200 | 25.17 |
| Sales analyzed by commodities | 19,848,100 | 74.83 |

Analysis of Sales Classified by Commodities

| Commodity | Item Totals | | Group Totals | |
|---|-------------|-------|--------------|--------|
| | \$ | % | \$ | % |
| Total sales classified | - | - | 19,848,100 | 100.00 |
| Food and Kindred Products, Total | - | - | 18,000,100 | 90.69 |
| Bakery products, fresh | 488,800 | 2.46 | - | - |
| Candy and confectionery | 207,600 | 1.05 | - | - |
| Fresh fruits and vegetables | 3,332,900 | 16.79 | - | - |
| Fresh and cooked meats (including poultry and fish) except canned goods | 1,180,500 | 5.95 | - | - |
| Dairy products and eggs (including butter, cheese, fluid milk and cream and eggs) | 2,222,000 | 11.20 | - | - |
| All other food products such as tea, coffee, sugar, flour, canned goods of all kinds, etc., etc. (including bottled beverages and ice cream other than that sold with meals or in soda fountain) | 10,568,300 | 53.24 | - | - |
| Cigars, cigarettes, tobacco | - | - | 339,500 | 1.71 |
| Household Supplies, Total | - | - | 1,421,600 | 7.16 |
| Soaps, (laundry and toilet) and cleaning compounds | 955,300 | 4.81 | - | - |
| Other household supplies such as brooms, brushes, floor wax, toilet paper, kitchen utensils and cutlery, oil lamps and oil, ladders, etc. | 466,300 | 2.35 | - | - |
| All Other Merchandise, Total | - | - | 86,900 | 0.44 |

Table 9.--Combination Store Chains--Sales by Commodities, 1941

| | \$ | % |
|---|-------------|--------|
| Total retail sales, combination chains | 145,794,100 | 100.00 |
| Less amount not classified by commodities | 3,290,600 | 2.26 |
| Sales analyzed by commodities | 142,503,500 | 97.74 |

Analysis of Sales Classified by Commodities

| Commodity | Item Totals | | Group Totals | |
|--|-------------|-------|--------------|--------|
| | \$ | % | \$ | % |
| Total sales classified | - | - | 142,503,500 | 100.00 |
| Food and Kindred Products, Total | - | - | 129,725,000 | 91.03 |
| Bakery products, fresh | 2,971,900 | 2.08 | - | - |
| Candy and confectionery | 1,456,800 | 1.02 | - | - |
| Fresh fruits and vegetables | 19,204,100 | 13.48 | - | - |
| Fresh and cooked meats (including poultry and fish, except canned goods) | 27,032,300 | 18.97 | - | - |
| Dairy products and eggs (including butter, cheese, fluid milk and cream and eggs) | 16,367,500 | 11.49 | - | - |
| All other food products such as tea, coffee, sugar, flour canned goods of all kinds, etc., etc. (including bottled beverages and ice cream other than that sold with meals or in soda fountain) | 62,692,400 | 43.99 | - | - |
| Sales of Beer and Wine (Quebec Province) | - | - | (x) | (x) |
| Receipts from Sale of Meals and Lunches (including soda fountain sales) | - | - | (x) | (x) |
| Cigars, Cigarettes, Tobacco | - | - | 1,212,300 | 0.85 |
| Household Supplies, Total | - | - | 10,900,000 | 7.65 |
| Scaps, (laundry and toilet) and cleaning compounds | 7,578,400 | 5.32 | - | - |
| Other household supplies such as brooms, brushes, floor wax, toilet paper, kitchen utensils and cutlery, oil lamps and oil, ladders, etc. | 3,321,600 | 2.33 | - | - |
| All Other Merchandise, Total | - | - | 639,200 | 0.44 |

(x) Indicates that figures are withheld to avoid disclosing individual operations.

Table 10.--Meat and Fish Market Chains--Sales by Commodities, 1941

| | \$ | % |
|---|-----------|--------|
| Total retail sales, meat and fish market chains | 5,088,500 | 100.00 |
| Less amount not classified by commodities | 181,200 | 3.56 |
| Sales analyzed by commodities | 4,907,300 | 96.44 |

Analysis of Sales Classified by Commodities

| Commodity | Item Totals | | Group Totals | |
|---|-------------|-------|--------------|--------|
| | \$ | % | \$ | % |
| Total sales classified | - | - | 4,907,300 | 100.00 |
| Food and Kindred Products, Total | - | - | 4,899,000 | 99.83 |
| Fresh fruits and vegetables | 37,600 | 0.77 | " | " |
| Fresh and cooked meats (including poultry and fish) except canned goods | 4,232,500 | 86.25 | " | " |
| Dairy products and eggs (including butter, cheese, fluid milk and cream and eggs) | 403,000 | 8.21 | " | " |
| All other food products such as tea, coffee, sugar, flour, canned goods of all kinds, etc., etc. (Including bottled beverages and ice cream other than that sold with meals or in soda fountain) | 225,900 | 4.60 | " | " |
| All other merchandise, Total | - | - | 8,300 | 0.17 |

Table 11.--Operating Expenses of Grocery Store Chains, 1941

| | All Chains | Chains analyzed according to number of units operated | | Chains analyzed according to type of stores operated | |
|---|---------------|--|------------------------------------|---|----------------------|
| | | Chains with less than 25 units | Chains with 25 or more units | Straight grocery | Grocery and other |
| | | Column 1 | Column 2 | Column 3 | Column 4 |
| A. Number of chains | 28 | 23 | 5 | 16 | 12 |
| B. Number of stores | 448 | 212 | 236 | 284 | 164 |
| C. Sales -- | | | | | |
| 1. Retail sales through stores | \$ 26,522,300 | \$ 16,069,800 | \$ 10,453,500 | \$ 12,475,900 | \$ 14,047,400 |
| 2. Average sales per store | \$ 59,204 | \$ 75,801 | \$ 44,294 | \$ 43,929 | \$ 85,655 |
| 3. Wholesale sales to other firms | \$ 153,700 | \$ 84,800 | \$ 68,900 | \$ 108,700 | \$ 45,000 |
| 4. Total chain sales | \$ 26,677,000 | \$ 16,154,600 | \$ 10,522,400 | \$ 12,584,600 | \$ 14,092,400 |

Table 13.--Operating Expenses of Meat and Fish Market Chains, 1941

| | All Chains | Chains with less than 15 units | Chains with 15 or more units |
|--|--------------|--------------------------------------|------------------------------------|
| A. Number of chains | 17 | 14 | 3 |
| B. Number of stores | 166 | 83 | 83 |
| C. Sales -- | | | |
| 1. Retail sales through stores | \$ 5,088,500 | \$ 3,474,500 | \$ 1,614,000 |
| 2. Average sales per store | \$ 30,653 | \$ 41,861 | \$ 19,446 |
| 3. Wholesale sales to other firms | - | - | - |
| 4. Total chain sales | \$ 5,088,500 | \$ 3,474,500 | \$ 1,614,000 |
| D. Store employment and payroll -- | | | |
| Full-time employees -- | | | |
| 1. Male employees, number | 481 | 295 | 186 |
| 2. Female employees, number | 33 | 30 | 3 |
| 3. Salaries and wages | \$ 529,000 | \$ 331,800 | \$ 197,200 |
| Part-time employees -- | | | |
| 1. Male employees, number | 216 | 140 | 76 |
| 2. Female employees, number | 9 | 5 | 4 |
| 3. Salaries and wages | \$ 61,900 | \$ 43,300 | \$ 18,600 |
| E. Chain expenses -- | | | |
| Store expenses -- | | | |
| 1. Wage cost -- Amount | \$ 590,900 | \$ 375,100 | \$ 215,800 |
| 2. Per cent of total sales | 11.61 | 10.80 | 13.37 |
| 3. Other expenses including rent -- | | | |
| Amount | \$ 424,100 | \$ 264,900 | \$ 159,200 |
| 4. Per cent of total sales | 8.34 | 7.62 | 9.86 |
| 5. Total store expenses -- Amount | \$ 1,015,000 | \$ 640,000 | \$ 375,000 |
| 6. Per cent of total sales | 19.95 | 18.42 | 23.23 |
| Overhead expenses -- Amount | \$ 68,200 | \$ 30,900 | \$ 38,300 |
| Per cent of total sales | 1.36 | 0.89 | 2.37 |
| Warehouse expenses -- Amount | \$ 3,100 | \$ 3,100 | - |
| Per cent of total sales | 0.06 | 0.09 | - |
| Total chain expenses -- Amount | \$ 1,087,300 | \$ 674,000 | \$ 413,300 |
| Per cent of total sales | 21.37 | 19.40 | 25.60 |
| F. Rentals -- | | | |
| 1. Number of stores in leased premises | 129 | 71 | 58 |
| 2. Sales of stores in leased premises | \$ 4,204,900 | \$ 3,172,700 | \$ 1,032,200 |
| 3. Rentals paid -- Amount | \$ 103,900 | \$ 75,200 | \$ 28,700 |
| 4. Per cent of sales in leased premises | 2.47 | 2.37 | 2.78 |
| G. Inventories, end of 1941 -- | | | |
| 1. Store inventories | \$ 116,000 | \$ 70,800 | \$ 45,200 |
| 2. Warehouse inventories | \$ 3,200 | \$ 3,200 | \$ - |
| 3. Total inventories | \$ 119,200 | \$ 74,000 | \$ 45,200 |
| H. Customers' accounts outstanding-- Amount | \$ 151,600 | \$ 55,700 | \$ 95,900 |
| Per cent of total sales | 2.98 | 1.60 | 5.94 |

Table 14.--Food Chains--Middle Range Figures, 1941

A. Grocery Store Chains

| | Lower limit of Middle Range | Median | Upper limit of Middle Range |
|---|-----------------------------------|-----------|-----------------------------------|
| 1. Total sales | \$210,000 | \$390,000 | \$830,000 |
| 2. Average sales per store | \$ 28,300 | \$ 39,600 | \$ 52,400 |
| 3. Average salary per full-time store employee | \$ 750 | \$ 890 | \$ 1,000 |
| 4. Average yearly sales per full-time store employee | \$ 11,000 | \$ 13,500 | \$ 15,100 |
| 5. Store payroll cost -- Per cent of total sales | 6.4 | 7.2 | 8.1 |
| 6. Other store expenses -- Per cent of total sales | 3.1 | 4.2 | 5.3 |
| (a) Per cent of total sales .. | 1.2 | 1.6 | 1.9 |
| 7. Rent -- (b) Per cent of sales in leased premises | 1.3 | 1.7 | 1.9 |
| 8. Total store expenses -- Per cent of total sales | 11.2 | 13.3 | 15.2 |
| 9. Overhead expenses ³ -- Per cent of total sales | 1.2 | 1.7 | 2.3 |
| 10. Warehouse expenses-- Per cent of total sales | 0.7 | 1.0 | 1.2 |
| 11. Total chain expenses-- Per cent of total sales | 13.3 | 14.6 | 16.7 |

B. Combination Store Chains

| | | | |
|---|-----------|-----------|-----------|
| 1. Total sales | \$360,000 | \$560,000 | \$960,000 |
| 2. Average sales per store | \$ 53,200 | \$ 77,600 | \$111,700 |
| 3. Average salary per full-time store employee | \$ 800 | \$ 900 | \$ 1,150 |
| 4. Average yearly sales per full-time store employee | \$ 10,700 | \$ 12,700 | \$ 15,200 |
| 5. Store payroll cost -- Per cent of total sales | 6.5 | 7.6 | 9.6 |
| 6. Other store expenses -- Per cent of total sales | 3.5 | 5.0 | 6.6 |
| (a) Per cent of total sales .. | 0.5 | 1.0 | 1.7 |
| 7. Rent -- (b) Per cent of sales in leased premises | 1.1 | 1.5 | 1.9 |
| 8. Total store expenses -- Per cent of total sales | 12.3 | 14.6 | 17.0 |
| 9. Overhead expenses ⁶ -- Per cent of total sales | 1.1 | 1.5 | 2.0 |
| 10. Warehouse expenses-- Per cent of total sales | 1.1 | 1.2 | 1.8 |
| 11. Total chain expenses -- Per cent of total sales | 13.1 | 16.2 | 18.2 |

Table 14.--Food Chains--Middle Range Figures, 1941--(Concl'd)

C. Meat and Fish Market Chains

| | Lower limit of Middle Range | Median | Upper limit of Middle Range |
|---|-----------------------------------|-----------|-----------------------------------|
| 1. Total sales | \$110,000 | \$240,000 | \$340,000 |
| 2. Average sales per store | \$ 22,400 | \$ 31,100 | \$ 42,100 |
| 3. Average salary per full-time store employee | \$ 970 | \$ 1,060 | \$ 1,160 |
| 4. Average yearly sales per full-time store employee | \$ 7,620 | \$ 9,700 | \$ 11,750 |
| 5. Store payroll cost -- Per cent of total sales | 9.8 | 12.7 | 13.4 |
| 6. Other store expenses -- Per cent of total sales | 4.7 | 6.0 | 8.9 |
| (a) Per cent of total sales. | 2.1 | 2.4 | 3.0 |
| 7. Rent -- (b) Per cent of sales in leased premises | 2.1 | 2.5 | 3.4 |
| 8. Total store expenses -- Per cent of total sales | 17.4 | 20.4 | 24.4 |
| 9. Overhead expenses-- Per cent of total sales | 2.1 | 2.5 | 3.0 |
| 10. Warehouse expenses-- Per cent of total sales | - | - | - |
| 11. Total chain expenses -- Per cent of total sales | 18.3 | 21.5 | 25.2 |

Note: Since each item on this table was obtained independently, the figures in one column cannot be related to each other. Nor can the individual expense items be added to obtain the total expense ratios shown. For explanation on the method used, see text.



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C.3

| Year | Value | Value | Description |
|------|---------|---------|-------------|
| 1980 | 100,000 | 100,000 | ... |
| 1981 | 100,000 | 100,000 | ... |
| 1982 | 100,000 | 100,000 | ... |
| 1983 | 100,000 | 100,000 | ... |
| 1984 | 100,000 | 100,000 | ... |
| 1985 | 100,000 | 100,000 | ... |
| 1986 | 100,000 | 100,000 | ... |
| 1987 | 100,000 | 100,000 | ... |
| 1988 | 100,000 | 100,000 | ... |
| 1989 | 100,000 | 100,000 | ... |
| 1990 | 100,000 | 100,000 | ... |

...