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FOOD STORE CHAINS

IN

CANADA

1945



OTTAWA 1946

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FOOD STORE CHAINS, 1945

There were 62 food chains in Canada operating 1,306 stores in 1945 according to the results of the annual survey of chain stores recently compiled by the Merchandising and Services Statistics of the Dominion Bureau of Statistics. These figures reveal a reduction from 1944 of 5 chains and 58 stores. The total volume of business transacted by chain stores, however, continued to increase, 1945 sales of \$218,968,700 being 6.9 per cent above the 1944 sales volume. An increase in average sales per store from \$150,185 in 1944 to \$167,664 in 1945 indicates a continuation of the trend towards larger volume stores. Food chains include grocery chains, combination grocery and meat chains, and meat market chains. For the purpose of this survey, a chain is an organization operating four or more stores under the same ownership.

The 6.9 per cent increase in dollar volume of business does not necessarily indicate an increase in physical volume of merchandise sold, since the Bureau's Retail Food Index for chain stores rose from 128.0 in 1944 to 130.0 in 1945. Any shift in consumer preference from lower price-range goods to higher priced merchandise would also tend to increase the dollar volume of sales without a proportionate increase in the physical volume of goods sold.

A comparison of the sales increases recorded for chain food stores and for independent food stores suggests almost parallel gains between 1944 and 1945 for these two types of outlets. The gain of 6.9 per cent in chain store sales compares with an increase of 6.5 per cent in sales of independent stores. This latter figure is based on the monthly sales of a continuing number of stores and does not take into account changes in the number of stores. The percentage gain for independents, therefore, does not reflect the effect on sales resulting from any net change in the number of independent stores between the two years.

Increases over 1944 in volume of chain food store sales were general in all regions of the country, ranging from 2.7 to 10.0 per cent. Food chains in the Maritime Provinces registered the smallest increase in sales over last year at 2.7 per cent. The largest gains were reported in Manitoba and Quebec where food chain sales were up 10.0 and 9.5 per cent respectively. Saskatchewan came next with an increase over 1944 of 8.4 per cent followed by a gain of 6.6 per cent for British Columbia, 6.3 per cent for Ontario, and 4.9 per cent for Alberta.

Of the 62 food chains, 29 were combination store chains principally composed of outlets handling both groceries and fresh meats. These 29 chains, however, operated 845 of the 1,306 chain food stores and transacted 81.5 per cent of the total sales

of food chains. Grocery store chains accounted for 15.7 per cent while the remaining 2.8 per cent was made up by meat market chains. All three kinds of stores recorded sharp increases over last year in average sales per store, grocery store sales advancing from \$82,436 per store to \$94,136; combination store sales, from \$193,240 to \$211,169; and sales per store for meat markets, from \$50,768 to \$63,969.

When grouped according to number of units operated, no appreciable change occurred from the previous year in the share of business done by chains falling within the three categories into which chains are classified. Stability also characterized the proportionate distribution of chain sales according to annual sales: volumes, the 18 chain companies with sales of over \$1,000,000 being responsible for 91.0 per cent of all food chain sales in 1945 and 90.5 per cent in 1944. Average sales per store for this group rose from \$174,667 per store in 1944 to \$190,875 in 1945.

Individual outlets of chains, however, did shift moderately upward in sales size as shown in Table 7 where they are classified by amount of annual sales. This is a natural result of the increase in average sales per store which causes some stores to move from one group to that next higher. Both the two largest sales size groups, including all chain food stores with sales of over \$300,000, showed gains in number of stores as well as in the proportion of total business transacted. Stores with sales of \$500,000 or over accounted for 18.5 per cent of all food chain business in 1945 with sales amounting to \$40,404,200 as compared with sales of \$32,521,500 or 15.9 per cent of the total food chain sales in 1944. All the sales size groups under \$300,000 reported a smaller proportion of the total trade than they had secured in 1944; at the same time there was a proportionately greater reduction in the number of stores in most of these smaller size groups.

Table 8 shows comparative figures for the years 1944 and 1945 for cities of 30,000 population and over and for places under 30,000. Canada totals reveal that chain store sales in places of under 30,000 population advanced 9.5 per cent over last year as compared with an increase of 5.3 per cent for cities of over 30,000 population. Cities of over 30,000 population in Eastern Canada generally had smaller increases in dollar volume of sales handled by food chains than places of under 30,000 population. Ontario cities of over 30,000 population registered an increase of only 3.4 per cent over 1944. This was weighted by Toronto where an increase of only 1.1 per cent can be partially explained by a decrease of 18 in the number of food chain stores in 1945. On the other hand, the greater percentage expansion in volume of business in the Western Provinces took place in cities of over 30,000 population.

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Table 1 .-- Principal Statistics of Food Store Chains for Selected Years

(Grocery, combination and meat market chains combined)

	1930	1941	1942	1943	1944	1945
Number of chains	87	79	70	69	67	62
Maximum number of stores	2,352	1,707	1,431	1,394	1,364	1,306
Total sales (at retail)	127,582,500	\$177,405,900	\$193,488,500	185,974,600	\$204,852,500	\$218,968,700
Chain sales index (1930=100).	100.0	139.1	151.7	145.8	160.6	171.6
Per cent change in sales from preceding year	-	+22.2	+ 9.1	- 3.9	+10.2	+ 6.9

Table 2 .-- Principal Statistics of Food Store Chains by Provinces

(Grocery, combination and meat market chains combined)

		1930	1941	1944	1945	Per cent change in sales 1944-1945
CANADA, TOTAL	Chains Stores Sales	87 2,352 \$127,582,500	79 1,707 \$177,405,900	67 1,364 \$204,852,500	62 1,306 \$218,968,700	+ 6.9
British Columbia (1)	Chains Stores Sales	19 246 \$10,194,900	14 282 \$18,765,300	12 224 \$22,537,500	11 206 \$24,025,700	+ 6.6
Alberta	Chains Stores Sales	8 120 \$5,587,000	8 103 \$7,932,100	7 91 \$10,772,100	6 86 \$11,303,600	+ 4.9

Table 2 .-- Principal Statistics of Food Store Chains by Provinces - (Concl'd.)

(Grocery, combination and meat market chains combined)

	II	1930	1941	1944	1945	Per cent change in sales 1944-1945
	Chains	10	4	3	3	
Saskatchewan	Stores		111	90	89	
	Sales	\$6,969,300	\$6,794,100	\$9,088,300	\$9,849,100	+ 8.4
	Chains	8	4	3	3	
Manitoba	Stores	121	85	60	60	
	Sales	\$5,689,100	\$8,247,500	\$9,867,900	\$10,847,400	+10.0
	Chains	37	41	36	33	
Ontario	Stores	1,107	790	633	609	
	Sales	\$70,769,300	\$99,318,600	\$108,121,500	\$114,916,900	+ 6.3
	Chains	13	7	6	7	
Quebec	Stores		214	172	166	
	Sales		\$28,477,200	\$34,864,000	\$38,164,500	+ 9.5
	Chains	12	14	11	10	
Maritime Provinces	Stores	98	122	94	90	
	Sales		\$7,871,100	\$9,601,200	\$9,861,500	+ 2.7

⁽¹⁾ Includes Yukon and Northwest Territories.

Table 3.-- Principal Statistics of Food Store Chains Classified by Kind of Business, 1930, and 1941-1945

		All	Grocery	Combination	Meat
	THE RESIDENCE OF STREET	food store	store	store	market
		chains	chains	chains	chains
	No. of chains	87	43	23	21
	No. of stores (maximum)	2,352	748	1,379	225
330	- Value of chain sales	\$127,582,500	\$44,698,400	\$74,800,200	\$8,083,900
700	Per cent of all food chain sales	100.0	35.0	58.6	6.4
	Average sales per store	\$54.244	\$59.757	\$54,242	\$35,929
	Manage agree bor and a session session	WO1,011	\$00 1 , 0,	401,010	400,000
	No. of chains	79	28	34	17
	No. of stores (maximum)	1,707	448	1,093	166
41 .	- Value of chain sales	\$177,405,900	\$26,523,300	\$145,794,100	\$5,088,500
	Per cent of all food chain sales	100.0	14.9	82.2	2.9
	Average sales per store	\$103,928	\$59,204	\$133,388	\$30,653
	No. of chains	70	24	32	14
	No. of stores (maximum)	1,431	394	899	138
42 .	- Value of chain sales	\$193,488,500	\$29,330,600	\$158,785,700	\$5,372,200
	Per cent of all food chain sales	100.0	15.2	82.1	2.7
	Average sales per store	\$135,212	\$74,443	\$176,625	\$38,929
				=0	1.0
	No. of chains	69	24	32	13
	No. of stores (maximum)	1,394	386	883	125
43	- Value of chain sales	\$185,974,600	\$29,497,700	\$150,335,800	\$6,141,100
	Per cent of all food chain sales	100.0	15.9	80.8	3.3
	Average sales per store	\$133,411	\$76,419	\$170,256	\$49,129
	No. of chains	67	24	31	12
	No. of stores (maximum)	1,364	377	868	119
24.4	- Value of chain sales	\$204,852,500	\$31,078,400	\$167,732,700	\$6,041,400
JII	Per cent of all food chain sales	100.0	15.2	81.9	2.9
	Average sales per store	\$150,185	\$82,436	\$193,240	\$50,768
	Note go sales por soil site.	V.C. V.C. V.C. V.C. V.C. V.C. V.C. V.C.	Working		
	No. of chains	62	23	29	10
	No. of stores (maximum)	1,306	366	845	95
945	- Value of chain sales	\$218,968,700	\$34,453,500	\$178,438,000	\$6,077,100
	Per cent of all food chain sales	100.0	15.7	81.5	2.8
	Average sales per store	\$167,664	\$94,136	\$211,169	\$63,969

Table 4 .-- Kinds of Stores Operated by Combination Store Chains, 1943, 1944, 1945

	Number of	Tota	l units	Groce	ry units	Combine	tion units	1000
	chains	Number	Sales	Number	Sales	Number	Sales	
			\$		\$		\$	
		- 1		1	943		0.11	
All combination store chains, total	32	(1) 883	150,335,800	253	18,841,100	623	131,150,900	
Less than 10 units	24	(1) 134	13,330,100	23	1,239,500	104	11.746.800	
10-99 units	4	109	10,961,800	37	2,245,500	72	8,716,300	
100 units and over	4	640	126,043,900	193	15,356,100	447	110,687,800	
				1	944			
All combination store chains, total	31	(2) 868	167,732,700	250	21,633,500	614	145,838,400	
Less than 10 units	23	(2) 127	13,371,400	2.5	1,374,900	98	11,735,700	
10-99 units	4	109	11,533,600	36	2,368,900	73	9,164,700	
100 units and over	4	632	142,827,700	189	17,889,700	443	124,938,000	
		F		1	945			
All combination store chains, total	29	(3) 845	178,438,000	237	22,752,700	604	155,402,900	
Less than 10 units	22	(3) 125	15,194,800	21	1,323,200	100	13.589.200	
10-99 units	3	94	10,826,400	32	2,025,500	62	8,800,900	
100 units and over	4	626	152,416,800	184	19,404,000	442	133,012,800	

⁽¹⁾ Includes 7 stores with sales of \$343,800 which cannot be classified as either grocery or combination stores.

⁽²⁾ Includes 4 stores with sales of \$260,800 which cannot be classified as either grocery or combination stores.

⁽³⁾ Includes 4 stores with sales of \$282,400 which cannot be classified as either grocery or combination stores.

Table 5.-- Food Store Chains Classified According to Number of Stores Operated, 1941, 1943-1945

(Grocery, combination and meat market chains combined)

			1941		1943				
Number of units	Number	Number	Total sales		Number	Number	Total sales		
	of chains	of	Amount	Per cent of total	of	stores	Amount	Per cent of total	
ll food chains, Total	79	1,707	177,405,900	100.0	69	1,394	185,974,600	100.0	
Less than 10 units	56 19 4	318 602 787	21,331,200 34,103,000 121,971,700	19.2	48 17 4	261 493 640	20,575,700 39,355,000 126,043,900	21.2	

			1944		1945			
Number of units	Number	Number	Total sales		Number	Number	Total sales	
	of chains	of stores	Amount	Per cent of total	of chains	of s stores	Amount	Per cent of total
food chains, Total	67	1,364	\$ 204,852,500	100.0	62	1,306	218,968,700	100.0
Less than 10 units	46	245	20,360,600	10.0	43	232	22,235,900	10.2
10-99 units	17	487	41,664,200	20.3	1.5	448	44,315,000	20.2
100 units and over	4	632	142.827,700	69.7	4	626	152,416,800	69.6

Table 6. -- Food Store Chains Classified According to Amount of Annual Sales, 1941, and 1943-1945 (Grocery, combination and meat market chains combined)

			1941	1 14	1943			
Annual sales	Number	Number of stores	Total sales		Number	Number	Total sales	
	chains		Amount	Per cent of total	of chains	of stores	Amount	Per cent of total
ll food chains, Total	79	1,707	177,405,900	100.0	69	1,394	185,974,600	100.0
\$1,000,000 and over \$ 500,000 - \$999,999 \$ 300,000 - \$499,999 \$ 200,000 - \$299,999 Less than \$200,000	14 21 13 13	1,154 285 96 86 86	152,322,200 14,859,600 5,061,700 3,059,900 2,102,500	8.4 2.9 1.7	19 12 15 12	1,083 114 84 65 48	167,058,600 8,344,000 6,053,700 2,975,800 1,542,500	89.8 4.5 3.3 1.6 0.8

			1944		1945				
Annual Sales	Number of	Number of stores	Total sales		Number	Number	Total sales		
	chains		Amount	Per cent of total	chains	stores	Amount	Per cent of total	
1 food chains, Total	67	1,364	\$ 204,852,500	100.0	62	1,306	\$ 218,968,700	100.0	
\$1,000,000 and over	18	1,061	185,321,900		18	1,044	199,273,300	91.0	
\$ 500,000 - \$999,999	16	1.26	10,501,700	5.1	15	122	11,154,500	5.1	
\$ 300,000 - \$499,999	13	81	5,048,400	2.5	11	55	4,612,500	2.1	
\$ 200,000 - \$299,999	12	62	2,958,500	1.4	12	58	3,098,800	1.4	
Less than \$200,000	8	34	1,022,000	0.5	6	27	829.600	0.4	

Table 7 .-- Food Store Chain Units Classified by Size of Rusiness, 1944 and 1945

(Grocery, combination and meat market chains combined)

		19	44		1945				
Anmial sales	Number	Sales	Per cent of total	Cumulative per cent	Number	Sales	Per cent of total	Cumulative per cent	
		\$				\$			
food chains, Total	1,364	204,852,500	100.0		1,306	218,968,700	100.0		
\$500,000 and over	53	32,521,500	15.9	15.9	62	40,404,200	18.5	18.5	
\$300,000 - \$499,999	138	53,696,700	26.2	42.1	158	61,651,200	28.1	46.5	
\$200,000 - \$299,999	163	40,334,100	19.7	61.8	171	42,195,000	19.3	65.9	
\$100,000 - \$199,999	280	40,500,100	19.8	81.5	276	39,770,500	18.2	84.1	
\$ 50,000 - \$ 99,999	357	25,140,500	12.3	93.8	357	25,065,000	11.4	95.5	
\$ 30,000 - \$ 49,999	260	10,507,700	5.0	98.9	204	8,351,800	3.8	99.3	
\$ 20,000 - \$ 29,999	60	1,569,000	0.8	99.7	47	1,213,300	0.6	99.9	
\$ 10,000 - \$ 19,999	27	442,500	0.2	99.9	19	259,600	0.1	100.0	
\$ 5,000 - \$ 9,999	14	103,800)	0.3	100.0	5	42,000)	(1)	(1)	
Less than \$5,000	12	36,500)	0.1	100.0	7	16,100)		(1)	

⁽¹⁾ Less than 0.05 per cent.

Table 8. -- Food Store Chains - Stores and Sales by Provinces and for Cities of 30,000 Population and Over, 1944 and 1945

	Numb	er of	Value o	f sales	
Province and City	sto	res	1944	1945	Per cent
110VIII0C and U10y	1944	1945	(1)	1040	change
CANADA, Total	1,364	1,306	\$204,852,400	\$218,968,700	+ 6.9
Places 30,000 and over, total	726	701	127,334,400	134,094,900	+ 5.3
Places under 30,000, total	638	605	77,518,000	84,873,800	+ 9.5
British Columbia, Total	224	206	22,537,500	24,025,700	+ 6.6
Places 30,000 and over, total	123	124	13,812,800	15,039,600	+ 8.9
Vancouver	112	113	11,612,400	12,665,600	+ 9.1
Victoria	11	11	2,200,400	2,374,000	+ 7.9
Places under 30,000, total	101	82	8,724,700	8,986,100	+ 3.0
Alberta, Total	91	86	10,772,100	11,303,600	+ 4.9
Places 30,000 and over, total	58	58	7,557,800	7,993,400	+ 5.8
Calgary	40	40	4,626,700	4,855,100	+ 4.9
Edmonton	18	18	2,931,100	3,138,300	+ 7.1
Places under 30,000, total	33	28	3,214,300	3,310,200	+ 3.0
Saskatchewan, Total	90	89	9,088,300	9,849,100	+ 8.4
Places 30,000 and over, total	29	29	4,413,200	4,861,300	+10.2
Regina	20	20	(x)	(x)	(x)
Saskatoon	9	9	(x)	(x)	(x)
Places under 30,000, total	61	60	4,675,100	4,987,800	+ 6.7
Manitoba, Total	60	60	9,867,900	10,847,400	+ 9.9
Places 30,000 and over, total	44	44	(x)	(x)	(x)
Winnipeg	44	44	(x)	(x)	(x)
Places under 30,000, total	16	16	(x)	(x)	(x)
Ontario, Total	633	609	108,121,500	114,829,600	+ 6.2
Places 30,000 and over, total	338	318	64,385,400	66,568,600	+ 3.2
Brantford	- 11	11	1,427,800	1,573,200	+10.2
Fort William	5	7	(x)	(x)	(x)
Hamilton	82	81	7,941,000	8,279,900	+ 4.3
Kingston	4	4	(x)	(x)	(x) + 9.0
Kitchener	4	4	1,489,900	1,623,400	+ 3.8
London	11.	11	3,280,500	3,405,100 7,785,700	+ 2.6
Ottawa	39	37	7,585,300	2,201,300	+ 5.1
St. Catharines		8	2,094,300	1,822,000	+ 1.9
Sudbury		136	1,788,300 32,270,500	32,617,700	+ 1.1
Toronto	154	136	4.421,000	4,638,700	+ 4.9
Windsor		13 291	43,736,100	48,261,000	+10.3
Places under 30,000, total	2.95	1	n revised.	10,001,000	

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

⁽x) Indicates figures are withheld to avoid disclosing individual operations, but these are included in the totals.

Table 8 .-- Food Store Chains - Stores and Sales by Provinces and for Cities of 30,000 Population and Over, 1944 and 1945 (Conclid.)

Province and City	Number of		Value of sales		Per cent
	1944	1945	1944 (1)	1945	change
Quebec, Total	172	166	\$34 ,864,000	\$38,251,800	+ 9.7
Places 30,000 and over, total	113	108	26,430,900	28,309,500	+ 7.1
Hull	1	1	(x)	(x)	(x)
Montreal	89	84	20,056,800	21,305,200	+ 6.2
Quebec	3	3	(x)	(x)	(x)
Sherbrooke	2	2	(x)	(x)	(x)
Three Rivers	3	3	(x)	(x)	(x)
Verdun	15	15	3,229,600	3,531,400	+ 9.3
Places under 30,000, total	59	58	8,433,100	9,942,300	+17.9
Maritime Provinces, Total .	94	90	9,601,100	9,861,500	+ 2.7
Places 30,000 and over, total	21	20	3,802,000	3,883,400	+ 2.1
Halifax	19	18	(x)	(x)	(x)
Saint John	2	2	(x)	(x)	(x)
Places under 30,000, total	73	70	5,799,100	5,978,100	+ 3.1

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

(x) Indicates figures are withheld to avoid disclosing individual operations, but these are included in the totals.

LIST OF FOOD CHAIN STORE FIRMS IN CANADA, 1945

Grocery Store Chains

B. & K. Economy Stores, Ltd., Butti, Mrs. A. (Carload Groceterias) Carroll's Ltd., Cash Foods Ltd., Curry's Grocery Ltd., Ford's Groceterias Co., Ltd., Gowman Grocery, The Hickman Stores, The Jenkins' Groceteria Ltd., Model Grocery Ltd.,

C.K. Economy Stores, Overwaitea Ltd., Pinch Stores. The J.C.

Pollock Wholesale Ltd., Sam, (Quality Groceteria) Ray's Superior Stores Ltd., Robertson, Ltd., S.M., Steinberg's Wholesale Groceterias Ltd., Tait Groceterias Ltd., Harry

1490 West Broadway, 268 Ferguson St., 19 Hughson St., S., 10316-107th St., 6115 Fraser St., 1221 St. James St., 181 Colborne St., 843 Bank St., 702-9th Ave., W., 308-6th St., 301 Ontario Ave., 1181 Richards St., 536 Queen St., E.,

71 Emerald St., S., 207 West Hastings St., Vancouver, P.C. Water St., 5400 Hochelaga St., 10012-101st Ave.,

Vancouver, B.C. North Ray, Ont. Hamilton, Ont. Edmonton, Alta. Vancouver, B.C. Montreal, P.Q. Brantford, Ont. Ottawa, Ontario. Calgary, Alta. New Westminster, R. C. Saskatoon, Sask. Vancouver, B.C. Sault Ste. Marie, Ont.

Hamilton, Ont. Shelburne, N.S. Montreal, P.Q. Edmonton, Alta.

LIST OF FOOD CHAIN STORE FIRMS IN CANADA, 1945 (Concl'd.)

Grocery Store Chains (Cont'd.)

Thomson Groceries Ltd., Toronto Grocery Stores. Wilbee's Service Stores Ltd., Ziebell Stores,

Combination Store Chains

Acadia Stores Ltd., Barker's Stores Ltd., Carload Grocery (Bertrand Bros.) Cohen, Louis Consumers Co-operative Society Ltd., The Cosmopolitan Stores. The Curtis Markets. David's Market Ltd., Dionne Ltee.

Dominion Stores Ltd.. Eaton Co. Ltd., The T. Fitzpatrick & Geraghty Ltd., Five United Markets Ltd.. Great A. & P. Tea Co. Ltd. International Provision Co. Ltd. Jewel Stores Ltd., Loblaw Groceterias Co. Ltd., Mason Stores, E.F. Powell & Co., Ltd., Power Food Markets, Ray's Limited. Safeway Stores Ltd., Shop-Easy Stores Ltd.,

Shoprite Stores, Shore's Chain Stores. Sobey, J.W. Thrift Stores, Ltd., Whyte Packing Co. Ltd., The Workers' Co-operative of New Ontario, Ltd., 64-3rd Ave.,

Buehler Bros. Ltd., Collins Ltd., Len Cooper Ltd., Joseph Cross' Stores Ltd., Duff's Meat Stores. O.K. Stores, Ltd.,

Meat Market Chains

Poyntz, A.

Pure Food Meat Markets Sterling Food Markets Ltd., Swanwick, A.

296 Greenwood Ave., 290 Queen St., E., 6027 Fraser St., 149 Pembroke St., W., Pembroke, Ont.

Toronto, Ont. Toronto, Ont. Vancouver, B.C.

245 Hollis St., King St., 634 Notre Dame St., 134 Sterling Road, 114 Algonquin Blvd., 214 Townsend St., 1028 Pape Ave., 106 Townsend St., 1221 St. Catherine St.,

W., 3 Sullivan St., 198 Rubidge St.. 552 Pitt St., W., 135 Laughton Ave., 626 Barrington St., 288 Princess St., Fleet & Bathurst Sts., Toronto, Ont. 429 George St., King & Main Sts., 118 King St., E., 501 Dominion Bank Bldg. Vancouver, B.C. Box 660, Oakland,

Bldg., 1502-12th Ave., W., Main St., Main St., 960 Outremont Ave., 78 Linton Ave.,

Halifax, N.S. Stellarton, N.S. Sudbury, Ont. Glace Ray, N.S. Timmins, Ont. Sydney, N.S. Toronto, Ont. Sydney, N.S.

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