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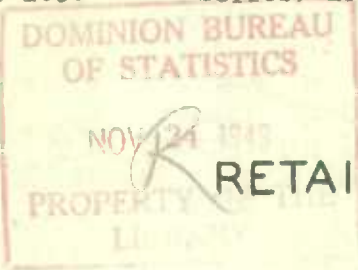
D.B.S. MEMORANDUM

Dominion Bureau of Statistics, Ottawa, Canada

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Series, 1948 - 10

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RETAIL FOOD STORE CHAINS, 1948

Retail food store chains, comprising grocery, combination store and meat chains, decreased in number of firms and stores from 1947 but increased their sales 27 per cent. Salaries paid to store employees and accounts outstanding at the end of the year showed corresponding gains of 21 per cent and 25 per cent respectively. Inventories of merchandise for resale remained nearer the 1947 level with an eight per cent rise in the dollar volume of stocks held in stores and 0.6 per cent increase in warehouse stocks. (Table 1)

All provinces shared in the dollar volume increase in business during 1948. The greatest gain was in Quebec at 32.4 per cent and ranged downward to a 15.8 per cent increase in Saskatchewan. (Table 2)

The four largest firms (over 100 units each) increased their proportion of total chain store business in the food trades transacting 73.4 per cent in 1948 as compared with 71.7 per cent in 1947. Similarly firms of over \$1,000,000 sales volume increased their proportion from 94.2 per cent in 1947 to 96.1 per cent in 1948. (Tables 3 and 4)

The continued expansion in the "super market" type of store is evidenced in table 5. Stores selling \$500,000 or more merchandise transacted 25.5 per cent of the chain food business in 1946, 40 per cent in 1947 and 58.3 per cent in 1948. Some of this upward shift may be attributed to the natural growth in dollar volume of stores formerly in the next smaller size category but a large part of it is due to the construction of new units of the super market type. (Table 5)

*Last pub'd
Later years see
Retail Chain Stores*

Food chain stores in localities of 30,000 population and over accounted for more of the increased dollar volume of business transacted in 1948 than did stores in the smaller localities. There was no decrease in sales volume in any city of over 30,000 population or in any provincial group of localities under 30,000 population. (Table 6)

The shift toward the combination type of store was continued in 1948. In 1931 combination chains transacted only 58.6 per cent of the total sales of the three trades. In 1941 this proportion had risen to 82.2 per cent; in 1947 it was 89.3 per cent and in 1948 91.8 per cent. Reclassification of chains from grocery to combination category is undoubtedly responsible for some of the change in ratio to 91.8 per cent. (Table 7)

In classifying a chain firm by the business carried on in the majority of its stores, it is obvious that some grocery chains may operate a few combination stores and combination chains some straight grocery stores. The individual units operated by these two types of food chains in 1948 were as follows:

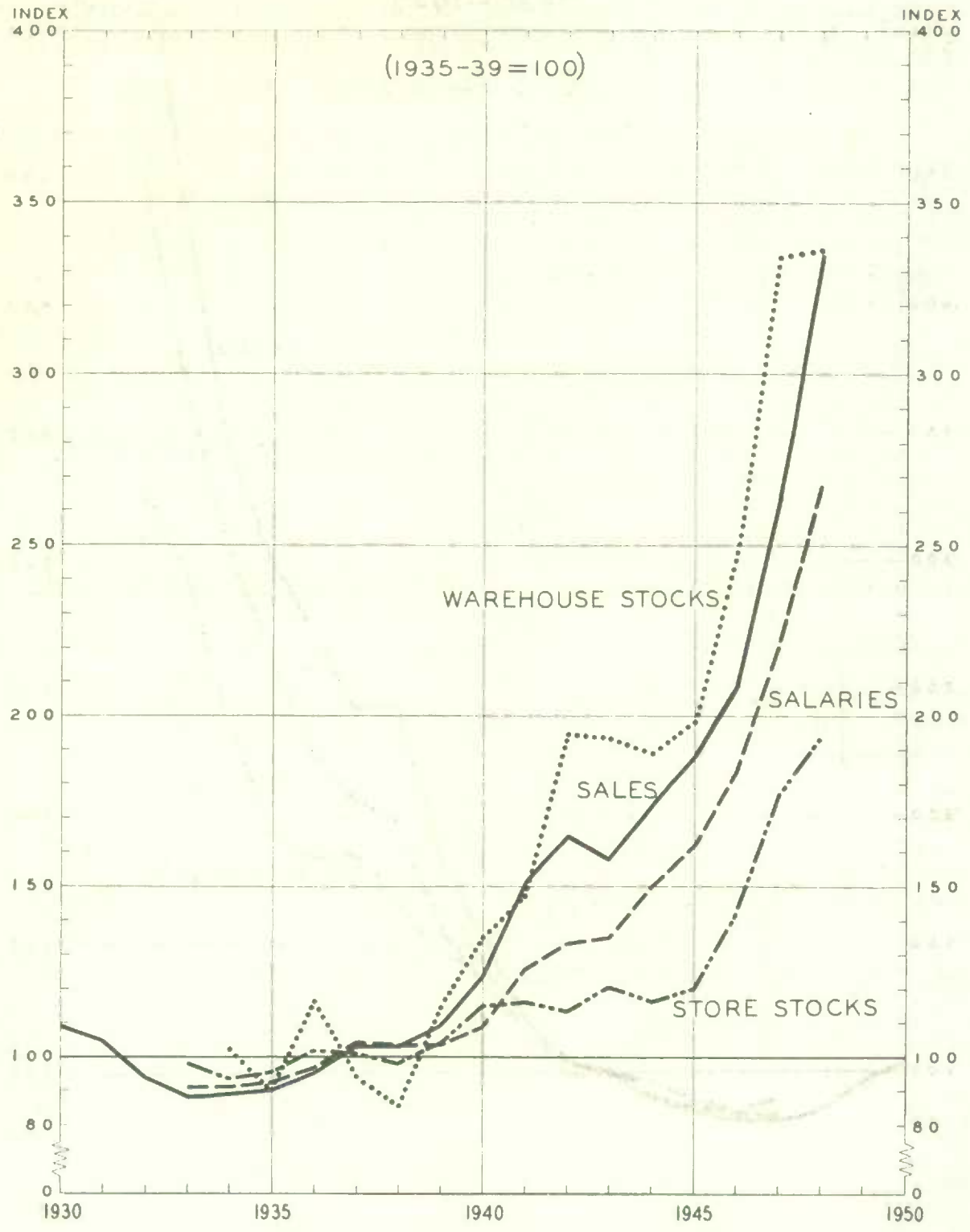
Grocery and Combination Units Operated by Grocery and Combination Chains, 1948

Kind of Business	Total Units		Grocery Units		Combination Units	
	Number	Sales \$	Number	Sales \$	Number	Sales \$
Grocery chains	266	25,596,600	252	22,675,500	14	2,921,100
Combination chains (1)	909	361,540,000	229	45,185,500	674	315,876,500

(1) Includes 6 stores with \$478,000 sales not classed as grocery or combination.

RETAIL FOOD CHAIN STORES TOTAL SALES, SALARIES, STORE AND WAREHOUSE STOCKS

1930 - 1948



RETAIL FOOD CHAIN STORES AVERAGE SALES, SALARIES AND STOCKS PER STORE

1930 - 1948

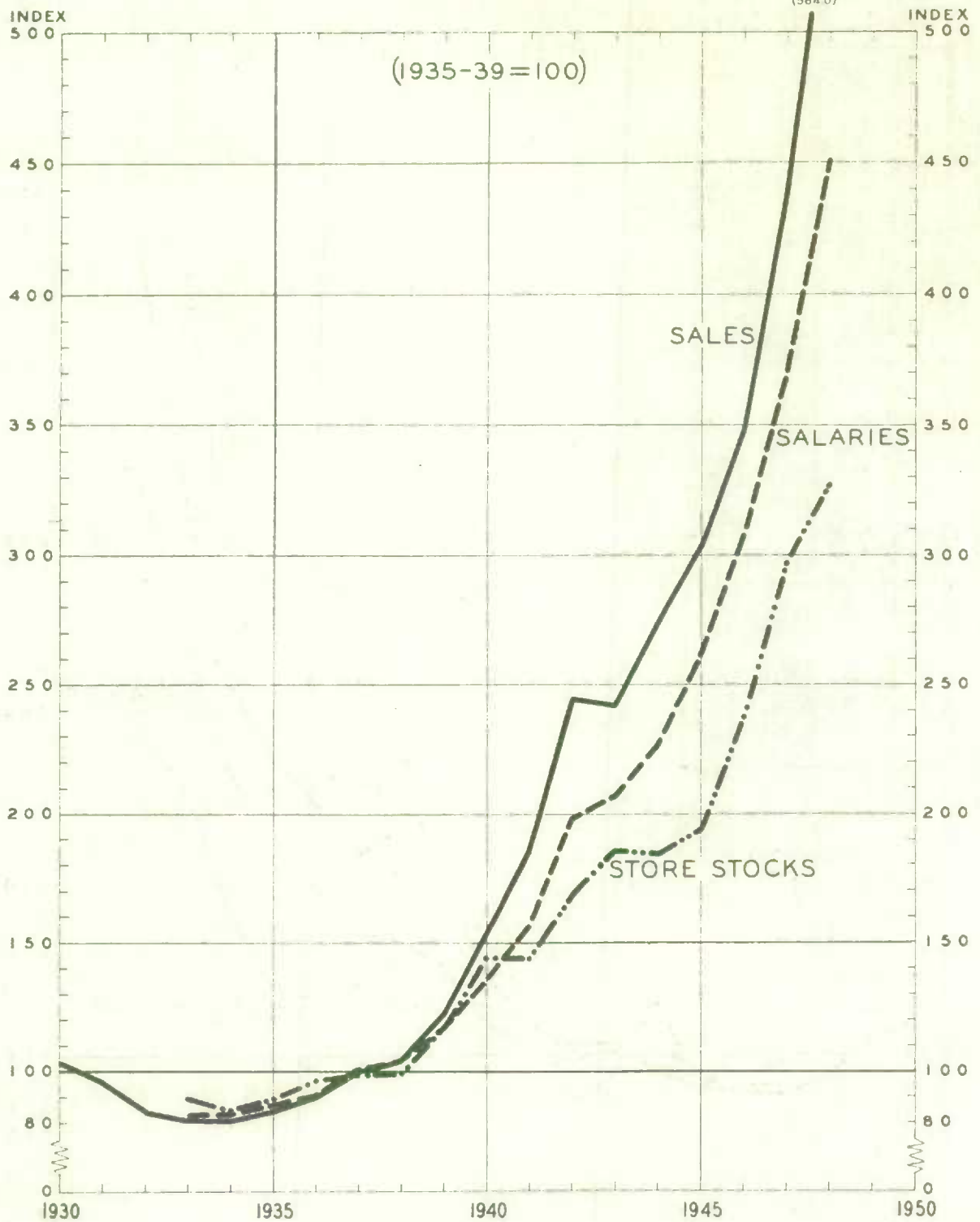


Table 1.-- Summary of Food Store Chains, 1930-1948

Year	Number of Chains	Number of Stores		Retail Sales		Salaries and Wages to Store Employees	Accounts Outstanding End of Year	Stocks on Hand End of Year	
		Average (1)	Maximum	Amount	Average per Store			Stores	Warehouses
				\$	\$	\$	\$	\$	\$
1930 ..	87	2,218	2,352	127,582,500	57,521	9,801,400	(a)	6,468,600	(a)
1931 ..	90	2,310	2,410	123,753,000	53,573	(a)	(a)	(a)	(a)
1932 ..	90	2,347	2,436	109,814,400	46,789	(a)	(a)	(a)	(a)
1933 ..	91	2,301	2,398	103,638,500	45,041	7,976,000	(a)	6,221,500	(a)
1934 ..	86	2,310	2,395	104,912,800	45,417	7,958,200	(a)	5,894,500	4,011,700
1935 ..	86	2,241	2,309	105,635,900	47,138	8,094,500	1,172,300	6,046,900	3,530,600
1936 ..	89	2,229	2,334	111,511,900	50,028	8,441,900	1,261,300	6,474,300	4,534,000
1937 ..	89	2,179	2,287	121,054,800	55,555	9,138,800	1,351,900	6,435,000	3,679,400
1938 ..	91	2,093	2,212	121,371,500	57,989	9,080,800	1,601,400	6,238,100	3,349,000
1939 ..	87	1,867	2,044	127,945,900	68,530	9,072,300	1,473,500	6,604,900	4,485,700
1940 ..	82	1,684	1,817	145,193,900	86,220	9,545,900	1,366,600	7,322,100	5,276,300
1941 ..	79	1,692	1,707	177,405,900	103,928	11,056,400	1,088,000	7,386,800	5,758,900
1942 ..	70	1,416	1,431	193,488,500	136,644	11,664,800	(a)	7,168,300	7,591,200
1943 ..	69	1,378	1,394	185,974,600	134,960	11,833,800	740,200	7,669,300	7,553,300
1944 ..	67	1,335	1,364	204,852,500	153,448	13,134,300	733,200	7,393,000	7,397,700
1945 ..	66	1,304	1,325	220,285,300	168,930	14,191,200	708,600	7,631,600	7,744,900
1946 ..	65	1,262	1,289	245,278,100	194,357	16,108,800	764,700	9,017,600	9,705,300
1947 ..	64	1,275	1,315	309,689,800	242,894	19,369,600	881,500	11,334,300	13,080,900
1948 ..	59	1,250	1,306	393,723,100	314,978	23,441,300	1,103,100	12,306,200	13,159,200

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

(2) Not available.

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

(Grocery, combination and meat market chains combined)

		1930	1941	1947	1948	Per cent change in sales 1947-1948
CANADA, TOTAL	Chains ...	87	79	64	59	
	Stores ...	2,352	1,707	1,315	1,306	
	Sales	\$127,582,500	\$177,405,900	\$309,689,800	\$393,723,100	+27.1
British Columbia(1)	Chains ...	19	14	12	10	
	Stores ...	246	282	223	210	
	Sales	\$ 10,194,900	\$ 18,765,300	\$ 33,205,300	\$ 41,375,200	+24.6
Alberta	Chains ...	8	8	3	2	
	Stores ...	120	103	76	66	
	Sales	\$ 5,587,000	\$ 7,932,100	\$ 13,762,400	\$ 17,296,100	+25.7
Saskatchewan	Chains ...	10	4	6	6	
	Stores ...	165	111	76	79	
	Sales	\$ 6,969,300	\$ 6,794,100	\$ 11,177,200	\$ 12,938,600	+15.8
Manitoba	Chains ...	8	4	4	4	
	Stores ...	121	85	77	81	
	Sales	\$ 5,689,100	\$ 8,247,500	\$ 16,540,200	\$ 19,756,500	+19.4
Ontario	Chains ...	37	41	33	34	
	Stores ...	1,107	790	599	607	
	Sales	\$ 70,769,300	\$ 99,318,600	\$166,355,900	\$213,497,800	+28.3
Quebec	Chains ...	13	7	9	9	
	Stores ...	495	214	170	175	
	Sales	\$ 23,708,400	\$ 28,477,200	\$ 55,953,100	\$ 74,059,000	+32.4
Maritime Provinces	Chains ...	12	14	11	10	
	Stores ...	98	122	94	88	
	Sales	\$ 4,664,500	\$ 7,871,100	\$ 12,695,700	\$ 14,799,900	+16.6

(1) Includes Yukon and Northwest Territories.

Table 3.--Food Store Chains Classified According to Number of Stores Operated, 1941, 1946-1948

(Grocery, combination and meat market chains combined)

Number of units	1941				1946			
	Number of chains	Number of stores	Total sales		Number of chains	Number of stores	Total sales	
			Amount	Per cent of total			Amount	Per cent of total
			\$				\$	
All food chains, Total	79	1,707	177,405,900	100.0	65	1,289	245,278,100	100.0
Less than 10 units	56	318	21,331,200	12.0	46	247	25,214,100	10.3
10-99 units	19	602	34,103,000	19.2	14	393	46,249,900	18.9
100 units and over	4	787	121,971,700	68.8	5	649	173,814,100	70.8

Number of units	1947				1948			
	Number of chains	Number of stores	Total sales		Number of chains	Number of stores	Total sales	
			Amount	Per cent of total			Amount	Per cent of total
			\$				\$	
All food chains, Total	64	1,315	309,689,800	100.0	59	1,306	393,723,100	100.0
Less than 10 units	44	231	26,829,600	8.7	39	204	26,006,700	6.6
10-99 units	16	463	60,683,300	19.6	16	469	78,602,700	20.0
100 units and over	4	621	222,176,900	71.7	4	633	289,113,700	73.4

Table 4.--Food Store Chains Classified According to Amount of Annual Sales, 1941, and 1946-1948

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(Grocery, combination and meat market chains combined)

Annual sales	1941				1946			
	Number of chains	Number of stores	Total sales		Number of chains	Number of stores	Total sales	
			Amount	Per cent of total			Amount	Per cent of total
			\$				\$	
All food chains, Total	79	1,707	177,405,900	100.0	65	1,289	245,278,100	100.0
\$1,000,000 and over	14	1,154	152,322,200	85.8	20	1,015	225,039,700	91.7
\$ 500,000 - \$999,999	21	285	14,859,600	8.4	18	139	12,638,800	5.2
\$ 300,000 - \$499,999	13	96	5,061,700	2.9	13	73	4,978,200	2.0
\$ 200,000 - \$299,999	13	86	3,059,900	1.7	5	24	1,241,700	0.5
Less than \$200,000	18	86	2,102,500	1.2	9	38	1,379,700	0.6

Annual sales	1947				1948			
	Number of chains	Number of stores	Total sales		Number of chains	Number of stores	Total sales	
			Amount	Per cent of total			Amount	Per cent of total
			\$				\$	
All food chains, Total	64	1,315	309,689,800	100.0	59	1,306	393,723,100	100.0
\$1,000,000 and over	24	1,088	291,720,300	94.2	25	1,121	378,466,100	96.1
\$ 500,000 - \$999,999	16	108	10,893,500	3.5	13	81	8,762,800	2.2
\$ 300,000 - \$499,999	12	66	4,885,700	1.6	10	53	4,138,100	1.1
\$ 200,000 - \$299,999	4	18	993,900	0.3	6	28	1,482,200	0.4
Less than \$200,000	8	35	1,196,400	0.4	5	23	873,900	0.2

Table 5.--Food Store Chain Units Classified by Size of Business, 1947 and 1948

(Grocery, combination and meat market chains combined)

Annual sales	1947				1948			
	Number	Sales \$	Per cent of total	Cumulative per cent	Number	Sales \$	Per cent of total	Cumulative per cent
All food chains, Total	1,315	309,689,800	100.0	-	1,306	393,723,100	100.0	-
\$500,000 and over	165	123,864,700	40.0	40.0	278	229,448,800	58.3	58.3
\$300,000 - \$499,999	194	75,646,600	24.4	64.4	177	68,608,300	17.4	75.7
\$200,000 - \$299,999	162	40,026,700	13.0	77.4	121	29,924,300	7.6	83.3
\$100,000 - \$199,999	269	38,718,100	12.5	89.9	276	38,781,800	9.9	93.2
\$ 50,000 - \$ 99,999	351	25,769,100	8.3	98.2	291	21,833,900	5.5	98.7
\$ 30,000 - \$ 49,999	114	4,702,300	1.5	99.7	93	3,796,000	1.0	99.7
\$ 20,000 - \$ 29,999	23	605,800	0.2	99.9	34	886,100	0.2	99.9
\$ 10,000 - \$ 19,999	19	259,300	0.1	100.0	25	380,200	0.1	100.0
Less than \$10,000	18	97,200	(a)	-	11	63,700	(a)	-

(a) Less than 0.05 per cent.

Note - Small size units may represent stores operated part year.

Table 6.--Food Store Chains - Stores and Sales by Provinces and for Cities
of 30,000 Population and Over, 1947 and 1948

Province and City	Number of stores		Value of sales		Per cent change
	1947	1948	1947	1948	
			\$	\$	
<u>CANADA, Total</u>	1,315	1,306	309,689,800	393,723,100	+27.1
Places 30,000 and over, total ...	756	751	195,432,000	250,092,500	+28.0
Places under 30,000, total	559	555	114,257,800	143,630,600	+25.7
British Columbia, Total	223	210	33,205,300	41,375,200	+24.6
Places 30,000 and over, total ...	141	132	21,033,600	26,181,900	+24.3
Vancouver	127	118	17,861,900	22,284,300	+24.8
Victoria	14	14	3,171,700	3,897,600	+22.9
Places under 30,000, total	82	78	12,171,700	15,193,300	+24.8
Alberta, Total	76	66	13,762,400	17,296,100	+25.7
Places 30,000 and over, total ...	52	44	9,928,700	12,515,700	+26.1
Calgary	40	33	(x)	(x)	(x)
Edmonton	12	11	(x)	(x)	(x)
Places under 30,000, total	24	22	3,833,700	4,780,400	+24.7
Saskatchewan, Total	76	79	11,177,200	12,938,600	+15.8
Places 30,000 and over, total ...	29	31	5,981,000	7,413,700	+24.0
Regina	19	21	(x)	(x)	(x)
Saskatoon	10	10	(x)	(x)	(x)
Places under 30,000, total	47	48	5,196,200	5,524,900	+ 6.3
Manitoba, Total	77	81	16,540,200	19,756,500	+19.4
Places 30,000 and over, total ...	59	63	11,846,200	14,252,700	+20.3
Winnipeg	59	63	11,846,200	14,252,700	+20.3
Places under 30,000, total	18	18	4,694,000	5,503,800	+17.3
Ontario, Total	599	607	166,355,900	213,497,800	+28.3
Places 30,000 and over, total ...	335	338	97,172,900	124,679,900	+28.3
Brantford	12	14	2,119,400	3,659,800	+72.7
Fort William	6	6	1,528,400	1,940,400	+27.0
Hamilton	79	78	11,140,900	13,620,300	+22.3
Kingston	3	4	1,945,500	2,842,600	+46.1
Kitchener	5	5	2,692,900	3,452,400	+28.2
London	11	8	4,802,500	6,836,100	+42.3
Ottawa	35	38	10,831,500	13,773,800	+27.2
Peterborough	13	19	3,337,800	4,045,300	+21.2
St. Catharines	11	11	3,693,200	4,742,900	+28.4
Sudbury	3	3	2,225,100	3,198,500	+43.7
Toronto	136	136	45,790,500	57,175,900	+24.9
Windsor	16	16	7,065,200	9,391,900	+32.9
Places under 30,000, total	264	269	69,183,000	88,817,900	+28.4

Table 6.--Food Store Chains - Stores and Sales by Provinces and for Cities
of 30,000 Population and Over, 1947 and 1948 - Concl.

Province and City	Number of stores		Value of sales		Per cent change
	1947	1948	1947	1948	
			\$	\$	
Quebec, Total	170	175	55,953,100	74,059,000	+32.4
Places 30,000 and over, total ...	120	122	44,151,100	58,346,000	+32.2
Hull	1	1	(x)	(x)	(x)
Montreal	87	91	31,026,400	42,052,400	+35.5
Outremont	7	7	2,755,200	3,512,800	+27.5
Quebec	4	4	(x)	(x)	(x)
Sherbrooke	2	2	(x)	(x)	(x)
Three Rivers	3	3	(x)	(x)	(x)
Verdun	16	14	5,363,600	6,737,500	+25.6
Places under 30,000, total	50	53	11,802,000	15,713,000	+33.1
Maritime Provinces, Total ..	94	88	12,695,700	14,799,900	+16.6
Places 30,000 and over, total ...	20	21	5,318,500	6,702,600	+26.0
Halifax	18	19	(x)	(x)	(x)
Saint John	2	2	(x)	(x)	(x)
Places under 30,000, total	74	67	7,377,200	8,097,300	+ 9.8

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

Table 7.--Principal Statistics of Food Store Chains Classified by Kind of Business, 1930, and 1941-1948

	All food store chains	Grocery store chains	Combination store chains	Meat market chains
1930 -				
No. of chains	87	43	23	21
No. of stores (average)	2,218	722	1,282	214
Value of chain sales	\$127,582,500	\$44,698,400	\$74,800,200	\$8,083,900
Per cent of all food chain sales	100.0	35.0	58.6	6.4
Average sales per store	\$57,521	\$61,909	\$58,346	\$37,775
1941 -				
No. of chains	79	28	34	17
No. of stores (average)	1,692	446	1,083	163
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	\$104,850	\$59,469	\$134,621	\$31,218
1946 -				
No. of chains	65	23	29	13
No. of stores (average)	1,262	334	820	108
Value of chain sales	\$245,278,100	\$37,018,200	\$200,659,100	\$7,600,800
Per cent of all food chain sales	100.0	15.1	81.8	3.1
Average sales per store	\$194,357	\$110,833	\$256,901	\$70,378
1947 -				
No. of chains	64	19	32	13
No. of stores (average)	1,275	299	874	102
Value of chain sales	\$309,689,800	\$25,394,200	\$276,402,100	\$7,893,500
Per cent of all food chain sales	100.0	8.2	89.3	2.5
Average sales per store	\$242,894	\$84,930	\$316,250	\$77,387
1948 -				
No. of chains	59	16	32	11
No. of stores (average)	1,250	266	909	75
Value of chain sales	\$393,723,100	\$25,596,600	\$361,540,000	\$6,586,500
Per cent of all food chain sales	100.0	6.5	91.8	1.7
Average sales per store	\$314,978	\$96,228	\$397,734	\$87,820

LIST OF FOOD CHAIN STORE FIRMS IN CANADA, 1948Grocery Store Chains

B. & K. Economy Stores Ltd.	1490 West Broadway	Vancouver, B.C.
Capital Grocers Ltd.	1333 Garnet St.	Regina, Sask.
Carroll's Ltd.	19 Hughson St. S.	Hamilton, Ont.
Curry's Grocery Ltd.	6115 Fraser St.	Vancouver, B.C.
Ford's Groceterias Co. Ltd.	1221 St. James St.	Montreal, P.Q.
Gowman Grocery, The	181 Colborne St.	Brantford, Ont.
Heglin, V. J.	211 River St. W.	Moose Jaw, Sask.
Hickman's Stores	843 Bank St.	Ottawa, Ont.
Jenkins' Groceteria Ltd.	702-9th Ave. W.	Calgary, Alta.
Mitchell, Donald	3 Coteau St. W.	Moose Jaw, Sask.
O.K. Economy Stores, The	301 Ontario Ave.	Saskatoon, Sask.
Overwaita Ltd.	1181 Richards St.	Vancouver, B.C.
Pollock Wholesale Ltd., Sam	71 Emerald St. S.	Hamilton, Ont.
Thomson Groceries Ltd.	296 Greenwood Ave.	Toronto, Ont.
Toronto Grocery Stores	290 Queen St. E.	Toronto, Ont.
Wilbee's Foodland Stores Ltd.	6027 Fraser St.	Vancouver, B.C.

Combination Store Chains

Acadia Stores Ltd.	245 Hollis St.	Halifax, N.S.
Bélanger & Cie, E.	1977 Frontenac St.	Montreal, P.Q.
Braund, Ernest	718 George St.	Peterborough, Ont.
Campbellton Cash and Carry Stores	88 Water St.	Campbellton, N.B.
Canada Safeway Ltd.	1425 Standard Bldg.	Vancouver, B.C.
Carload Groceteria	82 Geary Ave.	Toronto, Ont.
Consumers Co-operative Society Ltd., The	114 Algonquin Blvd.	Timmins, Ont.
Cosmopolitan Stores, The	214 Townsend St.	Sydney, N.S.
Curtis Markets	1028 Pape Ave.	Toronto, Ont.
David's Market Ltd.	106 Townsend St.	Sydney, N.S.
Dionne Ltée.	1221 St. Catherine St. W.	Montreal, P.Q.
Dominion Stores Ltd.	832 Old Weston Rd.	Toronto, Ont.
Eaton Co. Ltd., The T.		Toronto, Ont.
Fitzpatrick & Geraghty Ltd.	198 Rubidge St.	Peterborough, Ont.
Great A. & P. Tea Co. Ltd., The	135 Laughton Ave.	Toronto, Ont.
International Provision Co. Ltd.	626 Barrington St.	Halifax, N.S.
Jewel Stores Ltd.	288 Princess St.	Winnipeg, Man.
Loblaw Groceterias Co. Ltd.	Fleet & Bathurst Sts.	Toronto, Ont.
Mason Stores, The E.F.	433 George St.	Peterborough, Ont.
Pinch Stores, The J.C.	536 Queen St. E.	Sault Ste. Marie, Ont.
Powell & Co. Ltd.	King & Main Sts.	Dundas, Ont.
Power Food Markets	118 King St. E.	Toronto, Ont.



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LIST OF FOOD CHAIN STORE FIRMS IN CANADA, 1948 (Concl'd.)

Combination Store Chains (Concl'd.)

Schwartz & Sons, D.	1545 London St.	Windsor, Ont.
Shop-Easy Stores Ltd.	203 Confederation Life Bldg.	Winnipeg, Man.
Shore's Chain Stores	71 Main St.	Glace Bay, N.S.
Sobey's Stores Ltd.	King St.	Stellarton, N.S.
Steinberg's Wholesale Groceterias Ltd.	5400 Hochelaga St.	Montreal, P.Q.
Superior Food Stores Ltd.	501 Dominion Bldg.	Vancouver, B.C.
Thomson's Food Markets	8 Ontario St.	St.Catharines, Ont.
Thrift Stores Ltd.	960 Outremont Ave.	Montreal, P.Q.
Whyte Packing Co. Ltd., The	78 Linton Ave.	Stratford, Ont.
Workers' Co-operative of New Ontario Ltd	64-3rd Ave.	Timmins, Ont.

Meat Market Chains

Buehler Bros. Ltd.	2896 Dundas St. W.	Toronto, Ont.
Cooper Ltd., Joseph	1018 Bloor St.	Toronto, Ont.
Cross' Stores Ltd.	1310 Douglas St.	Victoria, B.C.
Duff's Meat Stores	73 King St.	Hamilton, Ont.
Home Service Meat Markets	815 W. Hastings St. Room 112.	Vancouver, B.C.
Johnson Markets, S.E.	2657 Commercial Drive	Vancouver, B.C.
Minor's Meat Markets	2130 Albert St.	Regina, Sask.
Poyntz, A.	790 St. Clair Ave. W.	Toronto, Ont.
Pure Food Meat Markets	203 First Ave.	Toronto, Ont.
Sterling Food Markets Ltd.	18 West Hastings St.	Vancouver, B.C.
Swanwick, A.	428 King St. W.	Hamilton, Ont.