

CHAPTER 2.—FOOD CHAINS

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RETAIL DISTRIBUTION BY FOOD CHAINS

GROCERY-STORE CHAINS

MEAT-MARKET CHAINS

COMBINATION-STORE (GROCERY AND MEAT) CHAINS

OTHER FOOD CHAINS

INTRODUCTION

Grocery chains and those in related fields, with total sales of \$3,028,594,826, are analyzed in this report. There are 313 grocery-store chains, 234 meat-market chains, 475 combination-store chains (those selling both groceries and meats), 12 fish-market chains, 10 chains selling groceries and dry goods, and 9 chains selling groceries and feed. The combined sales exceed one-third of all meat and grocery store business, chain and independent, in the United States.

The 313 grocery-store chains operate 12,330 stores with aggregate sales (in 1929) of \$490,946,311. The 475 combination-store chains operate 41,136 stores with aggregate sales of \$2,381,827,445. Many of the stores of the combination-store chains are strictly grocery stores (without fresh meat departments) but a substantial part of the business of chains so classified is the operation of combination stores. In the State and city reports of the Retail Census, each store is classified separately in accordance with the nature of its business, so that a grocery store or meat market is classified as such even though the chain of which it is a unit may be a combination-store chain. In contrast, each chain must be classified in its entirety. The total sales of combination-store chains can not be compared directly with the total sales of all combination stores to show chain ratio. However, Table 20 in this report contains the basis for an approximate comparison and shows that 53 per cent of the total sales of such chains are in combination stores. Table 6 in the United States Summary of Retail Distribution shows a further classification of food stores by types of operation.

The 234 meat-market chains operate 2,753 stores with aggregate sales of \$139,577,081. The 12 fish-market chains operate 51 stores with total sales of \$1,540,415.

In addition to the more usual kinds of food chains enumerated above, there are 10 chains which operate 187 stores which are a combination of a grocery store and a dry-goods store. Their total sales are \$11,331,102. There are also 9 chains which operate 44 stores which are a combination of a grocery store and a feed store. The 44 stores report total sales of \$3,372,472. Because the nature of such business is unusual, and is not comparable with that of other kinds of grocery chains, these 19 special chains have not been included with other chains in this report, but are separately reported in Tables 21 and 22.

OPERATING EXPENSES

The ratio of store operating expenses to sales of the 12,330 chain grocery stores is 13.84 per cent, of which pay roll is 7.77 per cent. Rental cost in stores occupying leased premises is 2.88 per cent to total sales in such leased premises.

The ratio of store operating expenses to sales of the 2,753 chain meat markets is 18.34 per cent, of which pay roll is 10.15 per cent. Rental cost to sales in leased premises is 3.35 per cent.

The ratio of store operating expenses to sales of the 41,136 stores of chains which sell both groceries and meats is 14.31 per cent, of which pay roll is 7.55 per cent. Rental cost in leased premises is 2.56 per cent of sales in such premises.

An interesting comparison of expenses based upon the cost of rent is shown in Table 7.

Although most chains pro-rate central office expenses to their stores, in this industry it is not the usual practice. Partial data as to central office administrative salaries (executives, merchandisers, buyers, and office employees), based upon returns from 120 chains with aggregate sales of \$424,826,205, which is about 28 per cent of the total after eliminating the three largest chains, indicates this additional operating expense in grocery chains is 1.59 per cent to sales, in meat market chains it is 2.27 per cent, and in combination-store chains it is 1.03 per cent.

In many tables in this report, the three largest chains are separately reported so that they will not dominate the totals, inasmuch as nearly 50 per cent of the total business of all the chains is done by these three largest organizations. As an example of the effect of such domination of aggregate figures, the ratio of store operating expenses of all combination-store chains except the three largest is 15.46 per cent, while that of the three largest chains is 13.60 per cent, making the average ratio to sales for all the chains appear as 14.31 per cent. Table 6 presents some new comparisons, which indicate how inadequate has been much of the information heretofore available, based upon averages which included one or more of the three dominating chains, and why conclusions drawn from such general averages are misleading.

GROWTH OF CHAINS

Of approximately 50,000 chain stores which could be classified as to age, 12.3 per cent were established in 1929, 43.7 per cent were established in the four years 1925 to 1928 and 44 per cent were established prior to 1925. The relatively small number of stores established in 1929 marks this branch of chain retailing as conservative in that chains in many fields registered substantial increases during that year.

GEOGRAPHIC DISTRIBUTION

Of the 56,219 chain units analyzed, the Middle Atlantic States contain 33.05 per cent. The East-North-Central States, surrounding Chicago, contain 24.37 per cent, while the New England States contain 12.57 per cent. Next in order are the South Atlantic States, with 8.77 per cent, and the Pacific coast with 7.53 per cent. Table 4 shows the distribution of stores in other geographic divisions, and further divides the data by size of chains.

Of the total sales of all chains in this field, 46.3 per cent is in cities of more than 100,000 population, 17.7 per cent is in cities with population between 100,000 and 25,000, 11.7 per cent is in cities with population between 25,000 and 10,000, and 24.3 per cent is in cities and places of less than 10,000 population. This is further analyzed in Table 3 according to size of chains.

COMBINATION-STORE CHAINS

The largest group of chains in the food field is that of organizations operating both grocery and meat stores, or combination grocery-meat stores. There are 475 such chains, operating 41,136 stores, with total annual sales of \$2,381,827,445. Although not all of the stores sell both groceries and meats, all of the chains included in this classification operate a substantial proportion of such combination grocery-meat stores. Grocery chains which were still experimenting in 1929 with combination stores, by adding meat departments in a few selected units of their grocery stores, were not classified as combination-store chains.

The average unit of combination-store chains shows annual sales of \$57,901 at a ratio of store-operating expenses to sales of 14.31 per cent. Pay roll is 7.55 per cent. Of the 41,136 stores, 37,661 are in leased premises for which the cost of rent averages 2.56 per cent to sales in such leased premises. Slightly more than 10 per cent of the units operating at the end of the census year 1929 were established in that year. The largest percentage of growth that year, as shown in Table 16, is in local chains in cities of less than 25,000 population, doing an annual volume of between \$500,000 and \$1,000,000 per chain. Based on the number of units in the chain, the largest percentage of growth in 1929 is shown to be in chains operating more than 100 and less than 1,000 units, with the small chains of less than 26 units a close second.

As is true in the case of every kind of chain except motor vehicle dealers, those chains operating in the smaller cities show the lowest ratio of expenses to sales. Local chains in small cities show a ratio of expense to sales of 12.61 per cent. All types of chains operating in cities of less than 25,000 population show a ratio of expense to sales of 12.78 per cent. These ratios compare with 14.31 per cent for all chains, and 13.60 per cent for the three largest chains in the country which operate in large and small cities. The latter figure is exclusive of central organization expenses.

CREDIT SALES OF COMBINATION-STORE CHAINS

Only 148 chains report that they extend credit, and they do less than 6 per cent of the total sales of all combination-store chains. They operate 2,237 stores, with aggregate sales of \$140,495,144, of which 24.48 per cent, or \$34,398,817, is credit business. These chains operate at an expense ratio to sales of 19.74 per cent, of which 10.30 per cent is pay roll and 2.66 per cent is rent. The sales per store are somewhat higher than the average of chain stores which do not give credit, averaging \$62,805.

COMMODITIES SOLD BY COMBINATION-STORE CHAINS

Groceries constitute about 57 per cent of total sales of all chains in the combination-store classification. Meats and fish add about 15 per cent, while fruits and vegetables average 12.11 per cent. A list of the commodities is given in Table 19.

In this table, the breakdown of sales is shown separately for the three largest national chains as one group and all other combination-store chains as another group. This comparison shows there was considerable difference in practice in 1929 between the two groups, as to the proportionate sale of the several commodities which they reported. In the three largest chains, meats constitute only 12.22 per cent of sales, fish is a negligible item, all other related commodities are materially under the proportions sold by other chains, and groceries constitute more than 56 per cent of their total sales. The other chains did less than 59 per cent of their business in groceries, nearly 20 per cent in meats, nearly 4 per cent in bakery products and only 9.17 per cent in fruits and vegetables. The latter compares to 13.91 per cent by the three largest chains.

GROCERY-STORE CHAINS

Operating expenses of grocery-store chains are analyzed in some detail in Table 9, and show a ratio to sales of 13.84 per cent. Chains are classified first according to volume of sales, then according to the number of units operated, then by type of operation, and finally by size of city. The latter comparison shows that in cities of less than 25,000 population the pay roll expense is 6.24 per cent and rent

is 1.79 per cent. These expenses increase to 6.48 per cent and 2.27 per cent respectively, in cities of 25,000 to 100,000 population. They increase further to 7.27 per cent and 2.71 per cent respectively, in cities of more than 100,000 population. Sixty-two local chains operating entirely in small cities and towns show an expense ratio of 11.44 per cent, which is the lowest expense of any of the type-classifications.

Credit is extended to their customers by 60 grocery chains, operating 714 units. Credit sales aggregate 29.41 per cent of total sales of such chains, while their ratio of expenses is 16.28 per cent in comparison with a ratio for all grocery chains of 13.84 per cent.

COMMODITIES SOLD BY GROCERY-STORE CHAINS

About 70 per cent of the sales of these chains is of groceries. Fruits and vegetables account for 12.11 per cent. Other commodities of lesser importance, shown in more detail in Table 11, are bakery products, bottled beverages, confectionery and nuts, milk and cream, cigarettes, household supplies of minor importance, and a small amount of meats, fish and other sea foods.

MEAT-MARKET CHAINS

With an operating expense ratio of 18.34 per cent, the 234 meat-market chains show aggregate sales in 2,753 units of \$139,577,081. The sales per store average \$50,700. Of the average expense ratio of 18.34 per cent, 10.15 per cent is pay roll. About 44 per cent of the markets are in leased premises, for which the rent ratio is 3.35 per cent to sales in such leased premises.

Three of the chains operate more than 100 units each, 21 operate between 26 and 100 units each, and 210 are chains of less than 26 units. Cash-carry chains total 161, with 1,899 units, whereas 73 chains report that they extend credit. The information available would seem to indicate that markets which extend credit can operate at no greater expense, and less pay-roll expense, than those whose terms are strictly cash-carry. (See Table 14.) About 38 per cent of the total sales of all the chains is in such credit-extending markets. However, a more detailed comparison of 28 chains which extend credit, with 28 chains doing about the same aggregate business on the cash-carry basis (Table 13), shows a slight difference in favor of the cash-carry chains, although even in this comparison the pay-roll expense is lower in the credit chains. In grouping the 56 chains used in this comparison, 28 credit chains were picked at random from among those operating in medium-size cities, and 28 cash-carry chains were then matched against them with regard to size of city and total sales. No other points of comparison were used, and no selection whatever was employed.

The commodity table (Table 15) shows that meats, including poultry, make up 88 per cent of the total sales of the meat-market chains analyzed. Fish constitutes 5 per cent, groceries are a negligible quantity at 6 per cent, and there are small amounts of bakery products, fruits, vegetables, and delicatessen foods. The breakdown is based upon a commodity coverage of about 50 per cent.

FISH-MARKET CHAINS

The report includes a table (Table 20) summarizing the operations of 12 fish market chains, with 51 markets and total sales of \$1,540,415. The ratio of operating expenses of these chains is 36.62 per cent, of which pay roll is 21.26 per cent and rent is 4.39 per cent.

The commodities sold by these chains, based upon a commodity coverage of 38 per cent, are:

	Per cent
Fish and sea foods.....	95. 25
Fruits, vegetables, groceries.....	4. 75

OTHER GROCERY CHAINS

In addition to the more usual kinds of chains described in the preceding paragraphs, there are 10 chains which operate 187 stores, which are a combination of a grocery store and a dry-goods store. Their total sales are \$11,331,102.

There are also 9 chains which operate 44 stores, which are a combination of a grocery store and a feed store. The 44 stores report total sales of \$3,372,472.

Because of the small number of chains in these two classifications, no detailed analyses can be shown without the danger of disclosing individual operations. This report confines itself to a brief summary, contained in Tables 21 and 22.

OTHER FOOD CHAINS

There are classifications outside of the grocery and meat fields, but within the food group, which should be considered in connection with grocery chains.

There are 123 chains operating a total of 1,461 candy, nut, or confectionery stores, with total annual sales (in 1929) of \$53,893,969.

There are 85 chains operating 1,201 dairy products stores, selling milk, cream, cheese, butter, and eggs, with aggregate sales (in 1929) of \$335,561,369.

There are 51 chains operating 383 fruit and vegetable markets, with total sales (in 1929) of \$15,426,330.

There are 110 chains operating 1,216 stores selling bakery goods or acting as caterers, with total sales (in 1929) of \$40,572,053.

There are 39 other miscellaneous food chains operating 654 stores, with total sales (in 1929) of \$40,342,117.

None of these chains is further described in this report.

TABLE 1.—SUMMARY OF FOOD CHAINS

	Number of chains	Number of stores	Total net sales (1929)
Totals.....	1, 461	61, 416	\$3, 514, 390, 064
Analyzed in detail.....	1, 022	56, 219	3, 012, 350, 837
Grocery-store chains (see Tables 9 to 11).....	313	12, 330	490, 946, 311
Meat-market chains (see Tables 12 to 15).....	234	2, 753	139, 577, 081
Combination-store (grocery and meat) chains (see Tables 16 to 19).....	475	41, 136	2, 381, 827, 445
Analyzed briefly:			
Fish-market chains (see Table 20).....	12	51	1, 540, 415
Grocery and dry goods store chains (see Table 21).....	10	187	11, 331, 102
Grocery and feed store chains (see Table 22).....	9	44	3, 372, 472
Not analyzed:			
Dairy products chains.....	85	1, 201	335, 561, 369
Candy, nut, or confectionery chains.....	123	1, 461	53, 893, 969
Fruit and vegetable market chains.....	51	383	15, 426, 330
Caterer and bakery chains.....	110	1, 216	40, 572, 053
All other food chains.....	39	654	40, 342, 117

TABLE 2.—CHAIN UNITS CLASSIFIED BY KIND OF BUSINESS AND SIZE OF CITY—GROCERY, MEAT, AND COMBINATION CHAINS

	Total units all cities	Per cent of total units	UNITS LOCATED IN—				
			Cities of more than 100,000 population	Cities of 25,000 to 100,000 population	Cities of 10,000 to 25,000 population	Cities and places less than 10,000 population	Units unclassified
Totals, all units.....	56,219	100.00	25,678	9,010	5,769	13,509	2,253
Grocery-store chain units.....	12,330	21.94	5,391	1,735	1,120	2,417	1,667
Meat-market chain units.....	2,753	4.90	1,606	481	293	312	61
Combination-store chain units.....	41,136	73.16	18,681	6,794	4,356	10,780	525
Units of 3 national combination-store chains each operating more than 2,500 units (3 chains).....	23,925	42.55	11,123	3,882	2,416	6,420	84
Units of all other combination grocery and meat market chains (376 chains).....	16,278	28.95	7,041	2,706	1,825	4,282	424
Units of combination meat market and grocery chains (95 chains, total sales \$85,286,456).....	933	1.66	517	206	115	78	17

TABLE 3.—CHAIN UNITS CLASSIFIED BY DATE OF ESTABLISHMENT AND SIZE OF CHAIN—GROCERY, MEAT, AND COMBINATION CHAINS

	Total units all chains	Per cent of total units	UNITS IN CHAINS OF—					
			3 national chains of more than 2,500 units	All others with more than 1,000 units	501 to 1,000 units	101 to 500 units	26 to 100 units	Less than 26 units
Total.....	56,219	-----	23,925	9,085	4,072	8,543	3,864	6,730
Less units which can not be classified.....	6,252	-----	234	1,667	919	2,070	459	303
Units classified as to age.....	49,967	100.00	23,691	7,418	3,153	5,873	3,405	6,427
Established in 1929.....	6,152	12.3	1,817	744	223	511	451	2,406
Established 1925 to 1928.....	21,819	43.7	10,909	3,367	1,449	2,055	1,535	2,504
Established prior to 1925.....	21,996	44.0	10,965	3,307	1,481	3,307	1,419	1,517

TABLE 4.—CHAIN UNITS CLASSIFIED BY GEOGRAPHIC LOCATION AND SIZE OF CHAIN—GROCERY, MEAT, AND COMBINATION CHAINS

DIVISION	Total units all chains	Per cent of total units	UNITS IN CHAINS OF—					
			3 national chains of more than 2,500 units	All others with more than 1,000 units	501 to 1,000 units	101 to 500 units	26 to 100 units	Less than 26 units
United States, total.....	56,219	100.00	23,925	9,085	4,072	8,543	3,864	6,730
New England.....	7,069	12.57	2,330	2,514	39	1,284	558	344
Middle Atlantic.....	18,581	33.05	6,358	3,402	3,368	3,231	964	1,258
East North Central.....	13,700	24.37	7,976	1,300	653	1,010	960	1,801
West North Central.....	2,839	5.05	1,460	318	1	189	273	598
South Atlantic.....	4,929	8.77	2,465	241	11	1,206	228	778
East South Central.....	2,113	3.76	943	-----	-----	602	246	322
West South Central.....	1,871	3.33	839	14	-----	354	130	534
Mountain.....	885	1.57	294	108	-----	119	108	256
Pacific coast.....	4,232	7.53	1,260	1,188	-----	548	397	839

TABLE 5.—SALES CLASSIFIED BY SIZE OF CHAIN AND SIZE OF CITY—GROCERY, MEAT, AND COMBINATION CHAINS

	Cities of all sizes, total net sales	NET SALES, CITIES WITH POPULATION OF—			
		More than 100,000	25,000 to 100,000	10,000 to 25,000	Less than 10,000
Total, all chains.....	\$3, 012, 350, 837	\$1, 395, 745, 475	\$532, 292, 098	\$352, 171, 719	\$732, 141, 545
Per cent.....	100.00	46.3	17.7	11.7	24.3
3 national chains of—					
More than 2,500 units each.....	\$1, 474, 475, 398	\$649, 403, 272	\$241, 811, 103	\$176, 957, 988	\$406, 303, 035
Chains of—					
More than 1,000 units each (exclusive of 3 above).....	436, 609, 504	209, 657, 549	72, 384, 459	49, 053, 763	105, 513, 733
501 to 1,000 units.....	149, 742, 909	88, 102, 820	16, 514, 572	19, 096, 405	26, 029, 112
101 to 500 units.....	353, 390, 331	183, 278, 143	46, 737, 046	41, 193, 277	82, 181, 865
26 to 100 units.....	188, 410, 507	83, 224, 612	50, 723, 853	19, 674, 383	34, 787, 659
Less than 26 units.....	409, 722, 188	182, 079, 079	104, 121, 065	46, 195, 903	77, 326, 141

TABLE 6.—SUMMARY OF EXPENSE DATA—GROCERY, MEAT, AND COMBINATION CHAINS

	Grocery-store chains	Meat-market chains	COMBINATION-STORE CHAINS	
			3 largest national chains	All other chains
Number of chains.....	313	234	3	472
Number of units.....	12, 330	2, 753	23, 925	17, 211
Net sales (1929).....	\$490, 946, 311	\$139, 577, 081	\$1, 474, 475, 398	\$907, 352, 047
Total store operating expenses, per \$100 of sales.....	13.84	18.34	13.60	15.46
Pay roll, per \$100 of sales.....	7.77	10.15	7.17	8.17
Other store operating expenses, per \$100 of sales (including rent).....	6.07	8.19	6.43	7.29
Rent in leased premises per \$100 of sales in such leased premises (included above).....	2.88	3.35	2.11	2.56
Additional expenses: Central office administrative, buying, and clerical salaries (based on 120 chains, see Table 8).....	1.59	2.27	(1)	1.03

¹ Not reported.

TABLE 7.—CHAINS ANALYZED ACCORDING TO COST OF RENT—GROCERY, MEAT, AND COMBINATION CHAINS

	GROCERY—STORE CHAINS			MEAT—MARKET CHAINS			COMBINATION—STORE CHAINS		
	Chains paying rent in excess of 6 per cent of net sales	Chains paying rent less than 3 per cent of net sales	Chains paying rent in excess of 6 per cent of net sales	Chains paying rent less than 3 per cent of net sales	Chains paying rent to 6 per cent of net sales	Chains paying rent in excess of 6 per cent of net sales	Chains paying rent to 6 per cent of net sales	Chains paying rent less than 3 per cent of net sales	
Chains.....	10	83	14	113	107	8	89	378	
Units.....	144	4,369	231	1,481	1,041	45	2,970	38,121	
Net sales (1929).....	\$4,992,046	\$166,828,305	\$10,842,785	\$57,988,445	\$70,745,851	\$3,805,244	\$121,916,065	\$2,256,106,136	
Average sales per unit.....	34,667	38,185	46,938	39,155	67,960	34,561	41,049	59,183	
Total operating expenses.....	\$884,571	\$24,080,194	\$2,460,511	\$12,069,874	\$11,063,480	\$1,244,368	\$22,810,972	\$316,845,814	
Per \$100 of sales.....	17.72	14.43	22.69	20.81	15.64	32.70	18.71	14.04	
Total pay roll cost.....	\$469,329	\$13,536,179	\$1,337,631	\$6,470,396	\$16,357,704	\$595,757	\$12,157,705	\$167,157,739	
Per \$100 of sales.....	9.40	8.11	12.34	11.16	8.99	15.66	9.97	7.41	
Other store operating expenses, including rent.....	\$415,242	\$10,544,015	\$1,122,880	\$5,599,478	\$4,705,776	\$648,611	\$10,653,267	\$149,688,075	
Per \$100 of sales.....	8.32	6.32	10.35	9.65	6.65	17.04	8.74	6.63	
Rent in leased premises, per \$100 of sales in such leased premises (included in above figures).....	16.50	3.66	6.79	3.89	2.22	7.88	3.85	2.18	

¹ Rent in 11,586 leased premises.

² Rent in 2,596 leased premises.

³ Rent in 37,661 leased premises.

TABLE 8.—CENTRAL OFFICE ADMINISTRATIVE SALARIES—GROCERY, MEAT, AND COMBINATION CHAINS

[Executives, merchandisers, buyers, and clericals]

	All chains reporting central office administrative expense	Grocery-store chains	Meat-market chains	Combination-store chains
Number of chains reporting central office administrative expense.....	120	28	42	50
Net sales (1929) of these chains.....	\$424, 826, 205	\$109, 594, 813	\$57, 171, 442	\$258, 059, 950
Total salaries and wages paid officers and other employees.....	\$5, 683, 956	\$1, 739, 065	\$1, 298, 718	\$2, 646, 173
Per \$100 of sales.....	1.34	1.59	2.27	1.03
Number of salaried officers and merchandise executives.....	349	62	94	193
Salaries.....	\$2, 767, 789	\$806, 445	\$666, 053	\$1, 295, 291
Per \$100 of sales.....	.65	.74	1.16	.50
Number of central office employees.....	1, 773	510	342	921
Salaries.....	\$2, 916, 167	\$932, 620	\$632, 665	\$1, 350, 882
Per \$100 of sales.....	.69	.85	1.11	.53

TABLE 9.—STORE OPERATING EXPENSES—GROCERY STORE CHAINS
A—CHAINS CLASSIFIED ACCORDING TO VOLUME OF SALES

	Num-ber of chains	Num-ber of units	Net sales (1929)	Average sales per unit	Per cent of units estab-lished in 1929	STORE OPERATING EXPENSES					Rent in leased prem-ises per \$100 of sales in such leased prem-ises 1	
						Total	Per \$100 of sales	Pay roll	Per \$100 of sales	Other operating expenses (including rent)		Per \$100 of sales
Totals, all chains.....	313	12, 330	\$490, 946, 311	\$39, 817	10. 18	\$67, 968, 827	13. 84	\$38, 157, 277	7. 77	\$29, 811, 550	6. 07	2. 88
Chains whose sales are—												
More than \$10,000,000.....	11	6, 946	287, 680, 326	41, 417	6. 46	39, 181, 992	13. 62	23, 043, 838	8. 01	16, 138, 154	5. 61	2. 79
\$5,000,000 to \$10,000,000.....	4	926	29, 213, 018	31, 548	5. 08	3, 919, 886	13. 42	1, 552, 351	5. 31	2, 367, 535	8. 11	2. 90
\$2,500,000 to \$5,000,000.....	13	1, 170	45, 031, 182	38, 488	4. 19	6, 675, 835	14. 82	3, 563, 159	7. 91	3, 112, 676	6. 91	3. 26
\$1,000,000 to \$2,500,000.....	30	953	41, 962, 617	44, 032	11. 75	6, 305, 090	15. 03	3, 694, 527	8. 74	2, 640, 563	6. 29	2. 08
\$500,000 to \$1,000,000.....	61	1, 072	43, 124, 725	40, 228	18. 10	5, 777, 641	13. 40	3, 006, 451	6. 97	2, 771, 190	6. 43	2. 49
\$250,000 to \$500,000.....	70	556	25, 400, 855	45, 685	31. 29	3, 380, 377	13. 34	1, 847, 672	7. 27	1, 541, 705	6. 07	2. 31
\$100,000 to \$250,000.....	83	508	15, 534, 061	30, 579	24. 61	2, 217, 998	14. 28	1, 201, 987	7. 75	1, 016, 011	6. 53	2. 70
Less than \$100,000.....	41	199	2, 999, 527	15, 073	52. 76	501, 008	16. 70	277, 292	9. 24	223, 716	7. 46	3. 42

B—CHAINS CLASSIFIED ACCORDING TO NUMBER OF UNITS OPERATED

	Num-ber of chains	Num-ber of units	Net sales (1929)	Average sales per unit	Per cent of units estab-lished in 1929	STORE OPERATING EXPENSES					Rent in leased prem-ises per \$100 of sales in such leased prem-ises 1	
						Total	Per \$100 of sales	Pay roll	Per \$100 of sales	Other operating expenses (including rent)		Per \$100 of sales
Totals, all chains.....	313	12, 330	\$490, 946, 311	\$39, 817	10. 18	\$67, 968, 827	13. 84	\$38, 157, 277	7. 77	\$29, 811, 550	6. 07	2. 88
Chains of—												
More than 500 units.....	5	5, 320	210, 147, 721	39, 501	7. 03	28, 618, 380	13. 62	17, 443, 290	8. 30	11, 175, 090	5. 32	2. 76
100 to 500 units.....	15	3, 252	125, 196, 344	38, 498	4. 06	17, 323, 086	13. 84	8, 793, 911	7. 00	8, 559, 175	6. 84	3. 32
26 to 100 units.....	39	1, 654	61, 601, 737	37, 244	10. 34	8, 707, 050	14. 13	4, 642, 234	7. 53	4, 004, 826	6. 60	2. 99
Less than 26 units.....	254	2, 104	94, 000, 509	44, 677	27. 47	13, 320, 311	14. 10	7, 307, 862	7. 76	6, 012, 459	6. 39	2. 41

C—CHAINS CLASSIFIED ACCORDING TO TYPES OF OPERATION

Totals, all chains.....	313	12,330	\$490,946,311	\$30,817	10.18	\$67,968,827	13.84	\$38,157,277	7.77	\$29,811,550	6.07	2.88
Local chains.....	293	8,080	309,845,747	38,347	10.69	41,311,686	13.33	24,059,020	7.76	17,252,666	5.57	2.72
Large city locals.....	66	516	21,694,795	42,044	23.06	2,780,928	12.82	1,578,063	7.27	1,202,865	5.55	2.71
Smaller city and town locals.....	62	387	15,803,468	40,836	37.98	1,808,041	11.44	998,484	6.32	809,557	5.12	1.72
Sectional chains.....	19	1,771	181,100,564	42,612	9.22	26,657,141	14.72	14,098,257	7.79	12,588,884	6.93	3.19
National chains.....	1	2,479										

D—CHAINS CLASSIFIED BY SIZE OF CITY

(Includes only chains which operate all of their units in cities of the same size-class)

Chains used for this table.....	209	2,782	\$134,596,709	\$48,381	17.03	\$18,836,015	13.99	\$10,106,414	7.51	\$8,729,601	6.48	2.64
Chains operating all their units in cities and places of—												
More than 100,000 population.....	66	516	21,694,795	42,044	23.06	2,780,928	12.82	1,578,063	7.27	1,202,865	5.55	2.71
25,000 to 100,000 population.....	10	113	6,124,304	54,107	8.83	4,804,568	13.14	306,636	0.48	407,932	6.66	2.27
Less than 25,000 population.....	116	968	41,570,016	42,944	23.76	4,662,915	11.22	2,592,753	6.24	2,070,162	4.98	1.79
Chains operating in all sizes of cities in two or more geographic divisions.....	8	1,185	65,207,594	55,028	9.70	10,587,604	16.24	5,588,962	8.50	5,048,642	7.74	3.03

1 This is the per cent of rent in 11,586 leased premises to net sales in such leased premises.

2 This is the per cent of rent in wholly leased premises to net sales in such leased premises.

TABLE 10.—CREDIT SALES—GROCERY-STORE CHAINS

	Chains reporting credit
Number of chains.....	60
Number of units.....	714
Units located in cities or places of—	
More than 100,000.....	266
25,000 to 100,000.....	74
10,000 to 25,000.....	76
Less than 10,000.....	298
Net sales (1929).....	\$39,093,043
Credit sales.....	\$11,495,441
Per cent.....	29.41
Average sales per unit.....	\$54,752
Total store operating expenses.....	\$6,363,445
Per \$100 of sales.....	16.28
Pay roll.....	\$3,624,331
Per \$100 of sales.....	9.27
Other store operating expense (including rent).....	\$2,739,114
Per \$100 of sales.....	7.01
Rent, per \$100 of sales, included in previous item.....	2.92

TABLE 11.—SALES BY COMMODITIES—GROCERY-STORE CHAINS

	All grocery store chains	Grocery-store chains of less than 500 units	5 Grocery-store chains of more than 500 units
Total sales, all chains.....	\$490,946,311	\$280,798,590	\$210,147,721
Less—amount which cannot be broken down into commodities.....	134,237,076	134,237,076	-----
Sales further analyzed.....	356,709,235	146,561,514	210,147,721
	<i>Per cent</i>	<i>Per cent</i>	<i>Per cent</i>
Commodity.....	100.00	100.00	100.00
Bakery products.....	3.37	2.64	3.88
Beverages, bottled.....	1.16	.97	1.30
Confectionery and nuts.....	1.08	.84	1.24
Delicatessen and ready-to-serve foods.....	.18	.43	-----
Fish and other sea foods.....	.61	.11	.95
Fresh fruits and vegetables.....	12.11	8.98	14.29
Groceries, general line, total.....	69.75	74.22	66.64
Meats.....	4.14	4.19	4.10
Milk and cream.....	2.23	1.83	2.60
Restaurant operations.....	.26	.64	-----
Sales of nonfood products.....	5.06	5.15	5.00
A further partial breakdown of two of the above classifications, based upon a coverage of about 38 per cent in the case of groceries and 77 per cent in the case of nonfood products, is shown below:			
Groceries (general line).....	69.75	74.22	66.64
Butter and cheese.....	11.27	10.34	11.36
Eggs.....	7.62	4.12	8.68
Lard, cooking fats, etc.....	1.33	2.34	.94
Flour.....	1.90	2.92	1.50
Sugar.....	5.45	6.54	4.94
Canned goods and other groceries.....	42.18	47.96	39.22
Nonfood commodities.....	5.06	5.15	5.00
Cigars, cigarettes, and tobacco.....	2.21	1.71	2.28
Hardware, household supplies, stationery, and school supplies.....	2.10	2.18	2.07
All other nonfood products.....	.75	1.26	.65

TABLE 12.—STORE OPERATING EXPENSES—MEAT MARKET CHAINS
A—CHAINS CLASSIFIED ACCORDING TO VOLUME OF SALES

	Number of chains	Number of units	Net sales (1929)	Average sales per unit	Per cent of units established in 1929	STORE OPERATING EXPENSES					Rent in leased premises per \$100 of sales in such leased premises ¹	
						Total	Per \$100 of sales	Pay roll	Per \$100 of sales	Other operating expenses (including rent)		Per \$100 of sales
Totals, all chains.....	234	2, 753	\$139, 577, 081	\$50, 700	17. 62	\$25, 593, 865	18. 34	\$14, 165, 731	10. 15	\$11, 428, 134	8. 19	3. 35
Chains whose sales are—												
More than \$5,000,000.....	3	326	19, 571, 668	60, 036	18. 71	3, 359, 182	17. 16	1, 922, 006	9. 82	1, 437, 176	7. 34	4. 45
\$2,500,000 to \$5,000,000.....	9	360	30, 511, 312	84, 754	14. 17	5, 037, 670	16. 51	2, 581, 844	8. 46	2, 455, 826	8. 05	2. 82
\$1,000,000 to \$2,500,000.....	16	455	24, 398, 153	53, 622	11. 65	4, 728, 684	19. 38	2, 631, 356	10. 78	2, 097, 328	8. 60	3. 00
\$500,000 to \$1,000,000.....	37	565	26, 446, 791	46, 726	14. 66	5, 177, 608	19. 58	2, 823, 601	10. 68	2, 354, 007	8. 90	3. 45
\$250,000 to \$500,000.....	68	538	23, 868, 831	44, 366	23. 05	4, 449, 511	18. 64	2, 576, 587	10. 79	1, 872, 964	7. 85	3. 32
\$100,000 to \$250,000.....	76	403	12, 957, 013	32, 151	21. 10	2, 432, 315	18. 77	1, 392, 251	10. 74	1, 040, 064	8. 03	3. 43
Less than \$100,000.....	25	103	1, 823, 313	17, 365	20. 95	4, 408, 855	22. 42	2, 238, 086	13. 06	1, 170, 769	9. 36	4. 30

B—CHAINS CLASSIFIED ACCORDING TO NUMBER OF UNITS OPERATED

	Number of chains	Number of units	Net sales (1929)	Average sales per unit	Per cent of units established in 1929	STORE OPERATING EXPENSES					Rent in leased premises per \$100 of sales in such leased premises ¹	
						Total	Per \$100 of sales	Pay roll	Per \$100 of sales	Other operating expenses (including rent)		Per \$100 of sales
Totals, all chains.....	234	2, 753	\$139, 577, 081	\$50, 700	17. 62	\$25, 593, 865	18. 34	\$14, 165, 731	10. 15	\$11, 428, 134	8. 19	3. 35
Chains of—												
More than 100 units.....	3	380	13, 923, 259	36, 640	16. 84	3, 041, 406	21. 84	1, 661, 423	11. 93	1, 379, 983	9. 91	5. 27
26 to 100 units.....	21	867	51, 203, 705	59, 038	14. 65	8, 709, 394	17. 01	4, 770, 648	9. 33	3, 932, 746	7. 68	3. 01
Less than 26 units.....	210	1, 506	74, 450, 117	49, 436	19. 52	13, 843, 065	13. 89	7, 727, 660	10. 38	6, 115, 405	8. 21	3. 19

¹ This is the per cent of rent in 1,215 leased premises to net sales in such leased premises.

TABLE 12.—STORE OPERATING EXPENSES—MEAT MARKET CHAINS—Continued
C—CHAINS CLASSIFIED ACCORDING TO TYPES OF OPERATION

	Num-ber of chains	Num-ber of units	Net sales (1929)	Average sales per unit	Per cent of units estab-lished in 1929	STORE OPERATING EXPENSES					Rent in leased pre-mises per \$100 of sales in such leased pre-mises	
						Total	Per \$100 of sales	Pay roll	Per \$100 of sales	Other oper-ating ex-penses (including rent)		Per \$100 of sales
Totals, all chains.....	234	2,753	\$139,577,081	\$50,700	17.62	\$25,593,865	18.34	\$14,465,731	10.15	\$11,428,134	8.19	3.35
Local chains.....	224	2,354	107,460,826	45,650	19.67	20,683,744	19.25	11,507,187	10.71	9,176,557	8.54	3.51
Large city locals.....	99	782	40,541,805	51,844	22.80	7,737,174	19.08	4,393,144	10.83	3,344,030	8.25	3.53
Smaller city and town locals.....	15	74	3,031,422	40,965	18.82	544,940	17.98	293,170	9.61	253,770	8.37	2.40
Sectional chains.....	10	399	32,116,253	80,482	5.51	4,910,121	15.29	2,655,544	8.28	2,251,577	7.01	2.80
D—CHAINS CLASSIFIED BY SIZE OF CITY												
(Includes only chains which operate all of their units in cities of the same size-class)												
All chains used in this table.....	147	1,303	\$70,063,065	\$53,794	8.75	\$12,893,889	18.40	\$7,149,126	10.20	\$5,744,763	8.20	3.29
Chains operating all their units in cities and places of—												
More than 100,000 population.....	99	782	40,541,805	51,844	22.89	7,737,174	19.08	4,393,144	10.83	3,344,030	8.25	3.53
25,000 to 100,000 population.....	15	91	3,581,500	39,357	23.08	582,348	16.26	351,294	9.81	231,084	6.45	2.63
Less than 25,000 population.....	28	152	6,087,791	40,051	13.16	1,052,637	17.29	570,680	9.37	481,957	7.92	2.74
Chains with large volume of sales operating in all sizes of cities in two or more geographic divisions.....	5	278	19,881,999	71,518	7.55	3,521,730	17.71	1,834,038	9.22	1,687,692	8.49	3.07

TABLE 13.—COMPARISON OF OPERATING EXPENSES—MEAT-MARKET CHAINS

[Cash-carry chains compared with credit chains]

	Cash-carry chains	Credit-service chains
Number of chains used for this comparison.....	28	28
Number of units.....	445	287
Net sales (1929).....	\$19,847,410	\$16,334,315
Average sales per unit.....	\$44,601	\$56,914
Total store operating expenses.....	\$3,849,259	\$3,359,376
Per \$100 of sales.....	19.39	20.57
Pay roll.....	\$2,286,849	\$1,825,045
Per \$100 of sales.....	11.52	11.17
Other store-operating expenses (including rent).....	\$1,562,410	\$1,534,331
Per \$100 of sales.....	7.87	9.40
Rent in leased premises, per \$100 of sales in such leased premises (included in previous item).....	3.15	3.11
Full-time employees.....	1,305	898
Full-time salaries and wages.....	\$2,217,576	\$1,766,815
Part-time employees.....	169	128
Part-time salaries and wages.....	\$69,273	\$58,230
Average full-time salary.....	\$1,699	\$1,968
Sales per full-time employee.....	\$15,209	\$18,190

TABLE 14.—CREDIT SALES—MEAT-MARKET CHAINS

	All chains reporting credit	Chains reporting credit less than 10 per cent of sales	Chains reporting credit in excess of 10 per cent of sales
Number of chains.....	73	26	47
Number of units.....	854	331	523
Units located in cities of more than 100,000.....	435	169	266
Units located in cities between 25,000 and 100,000.....	168	83	85
Units located in cities between 10,000 and 25,000.....	115	35	80
Units located in cities and places of less than 10,000.....	136	44	92
Net sales, 1929.....	\$53,461,277	\$19,357,579	\$34,103,698
Credit sales.....	11,201,865	1,080,156	10,121,709
Average sales per unit.....	62,601	58,482	65,208
Total store operating expense.....	9,529,060	3,409,357	6,119,703
Per \$100 of sales.....	17.82	17.61	17.94
Pay roll.....	\$5,367,360	\$1,966,677	\$3,400,683
Per \$100 of sales.....	10.04	10.16	9.97
Other store expense (including rent).....	\$4,161,700	\$1,442,680	\$2,719,020
Per \$100 of sales.....	7.78	7.45	7.97
Rent in leased premises per \$100 of sales in such leased premises (included also in previous item).....	3.41	2.82	3.80

TABLE 15.—SALES BY COMMODITIES—MEAT-MARKET CHAINS

Net sales (1929).....	\$139,577,081
Less amount which can not be broken down into commodities.....	70,173,501
Sales further analyzed.....	69,403,580
Total.....	<i>Per cent</i> 100.00
Meats, including poultry.....	88.13
Bakery products, bottled beverages, confectionery, and nuts.....	.11
Delicatessen and ready-to-serve foods.....	.24
Fish and other sea foods.....	5.09
Fruits and vegetables, fresh.....	.41
Groceries, general line.....	6.02

TABLE 16.—STORE-OPERATING EXPENSES—COMBINATION-STORE (GROCERY AND MEAT) CHAINS
A.—CHAINS CLASSIFIED ACCORDING TO VOLUME OF SALES

	Num-ber of chains	Number of units	Net sales 1929	Average sales per unit	Per cent of units estab-lished in (1929)	STORE-OPERATING EXPENSES				Rent in leased premises per \$100 of sales in such leased premises ¹		
						Total	Per \$100 of sales	Pay roll	Per \$100 of sales		Other oper-ating expen-ses (includ-ing rent)	Per \$100 of sales
Totals, all combination store chains.....	475	41,136	\$2,381,827,445	\$57,901	10.72	\$340,901,154	14.31	\$179,911,201	7.55	\$160,989,953	6.76	2.56
Three national chains whose net sales exceed \$1,000,000.....	3	23,925	1,474,475,398	61,629	7.59	200,596,442	13.60	105,741,360	7.17	94,855,082	6.43	2.11
Chains whose net sales are—												
More than \$10,000,000 exclusive of above 3 chains.....	13	9,398	484,833,160	51,589	12.48	73,064,425	15.07	37,625,175	7.76	36,439,250	7.31	2.61
\$5,000,000 to \$10,000,000.....	17	2,393	124,121,547	51,869	5.56	20,366,424	16.41	10,584,750	8.53	9,781,674	7.88	2.49
\$2,500,000 to \$5,000,000.....	15	1,491	75,347,121	50,535	15.02	12,911,743	17.14	7,219,708	9.58	5,692,035	7.56	2.64
\$1,000,000 to \$2,500,000.....	57	1,267	87,063,373	68,716	13.58	13,459,635	15.46	6,249,933	8.33	6,209,702	7.13	2.93
\$500,000 to \$1,000,000.....	88	1,059	62,832,016	59,331	47.03	9,186,706	14.62	5,160,804	8.21	4,025,902	6.41	2.29
\$250,000 to \$500,000.....	144	917	51,138,577	55,767	22.03	7,859,363	15.37	4,344,985	8.50	3,514,378	6.87	2.13
\$100,000 to \$250,000.....	110	570	20,167,453	35,382	24.21	3,144,297	15.59	1,815,101	9.00	1,329,196	6.59	2.65
Less than \$100,000.....	28	116	1,848,770	15,938	46.55	312,119	16.88	169,385	9.16	142,734	7.72	3.06

B.—CHAINS CLASSIFIED ACCORDING TO NUMBER OF UNITS OPERATED

Totals, all chains.....	475	41,136	\$2,381,827,445	\$57,901	10.72	\$340,901,154	14.31	\$179,911,201	7.55	\$160,989,953	6.76	2.56
Three national combination store chains having more than 1,000 units.....	3	23,925	1,474,475,398	61,629	7.59	200,596,442	13.60	105,741,360	7.17	94,855,082	6.43	2.11
Combination store chains of more than 1,000 units (exclusive of 3 national chains shown above).....	4	6,607	333,155,328	50,425	6.93	48,951,864	14.69	25,398,007	7.62	23,553,857	7.02	2.72
Chains of 101 to 1,000 units.....	25	6,142	257,320,082	41,895	21.64	38,571,821	14.99	20,000,289	7.77	18,571,532	7.27	2.47
Chains of 26 to 100 units.....	28	1,341	75,606,065	56,380	11.41	13,159,054	17.40	7,119,804	9.41	6,039,160	7.99	2.66
Chains of less than 26 units.....	415	3,121	241,271,562	77,306	20.95	39,621,973	16.42	21,651,641	8.97	17,970,332	7.45	2.40

C—CHAINS CLASSIFIED ACCORDING TO TYPES OF OPERATION

	475	41, 136	\$2, 381, 827, 445	\$57, 901	10.72	\$340, 901, 154	14.31	\$179, 911, 201	7.55	\$160, 989, 953	6.76	2.56
Totals, all chains.....	444	8, 487	485, 858, 013	51, 356	22.63	68, 597, 068	15.74	37, 661, 272	8.64	30, 935, 786	7.10	2.60
Local chains.....	96	712	43, 447, 900	51, 022	18.82	7, 595, 401	17.48	4, 379, 262	10.08	3, 216, 139	7.40	2.63
Large—city locals.....	66	363	18, 278, 479	50, 354	26.72	2, 504, 497	12.61	1, 315, 202	7.20	98, 989, 236	3.41	1.78
Smaller—city and town locals.....	5	24, 843	1, 523, 437, 962	61, 323	.41	208, 562, 244	13.69	109, 623, 004	7.20	98, 989, 240	6.49	2.60
National chains.....	26	7, 806	422, 631, 470	54, 129	7.44	63, 741, 852	15.09	32, 626, 926	7.72	31, 114, 927	7.37	2.52
Three national chains operating more than 2,500 units (included above).....	3	23, 925	1, 474, 475, 398	61, 629	7.59	200, 596, 442	13.60	105, 741, 360	7.17	94, 855, 082	6.43	2.11

D—CHAINS CLASSIFIED BY SIZE OF CITY

[Includes only chains which operate all of their units in cities of same size class]

	294	34, 776	\$2, 047, 068, 465	\$58, 864	8.08	\$286, 887, 396	14.01	\$151, 059, 297	7.38	\$135, 828, 099	6.63	2.46
Chains used for this table.....	96	712	43, 447, 900	61, 022	18.82	7, 595, 401	17.48	4, 379, 262	10.08	3, 216, 139	7.40	2.63
Chains operating all their units in cities and places of—	73	461	29, 230, 868	63, 408	18.44	4, 083, 338	13.80	2, 247, 685	7.69	1, 785, 653	6.11	2.03
More than 100,000.....	107	695	38, 876, 807	55, 938	22.16	4, 968, 571	12.78	2, 174, 505	7.19	2, 174, 066	5.59	1.8
25,000 to 100,000.....	5	24, 843	1, 523, 437, 962	61, 323	.41	208, 562, 244	13.69	109, 623, 004	7.20	98, 989, 240	6.49	2.40
Less than 25,000.....	13	8, 065	412, 075, 928	51, 094	6.44	61, 727, 842	14.98	32, 014, 841	7.77	29, 713, 001	7.21	2.49
Large national chains operating in all size cities.....												
Chains operating in all sizes of cities, in two or more divisions.....												

1 This is the cost of rent in 37,661 leased premises in per cent to sales in such leased premises.
 2 This is the cost of rent in wholly leased premises in per cent to sales in such leased premises.

TABLE 17.—COMPARISON OF OPERATING EXPENSES—COMBINATION-STORE CHAINS

[Cash-carry chains compared with credit chains]

	Cash-carry chains (no service)	Credit chains (full service)
Number of chains.....	38	38
Number of units.....	725	544
Net sales (1929).....	\$35,606,601	\$35,606,196
Average sales per unit.....	49,113	65,453
Total store-operating expenses.....	\$4,773,656	\$7,062,519
Per \$100 of sales.....	13.4	19.8
Pay roll.....	\$2,739,833	\$3,792,690
Per \$100 of sales.....	7.7	10.6
Other store operating expenses (including rent).....	\$2,033,823	\$3,269,829
Per \$100 of sales.....	5.7	9.2
Rent in leased premises per \$100 of sales in such leased premises (included in figures on above line).....	2.45	2.48
Full-time employees.....	2,049	2,842
Full-time salaries and wages.....	\$2,613,758	\$3,678,888
Part-time employees.....	390	444
Part-time salaries and wages.....	\$126,075	\$113,802
Average full-time salary.....	\$1,276	\$1,294
Sales per full-time employee.....	\$17,378	\$12,520

NOTE.—This comparison is made between 38 chains operating strictly self-serve, cash-carry stores (also called self-help or serviceless stores) and 38 comparable chains which provide full clerical and delivery service and charge accounts.

The difference in expense reflects the cost of the service of sales people, telephone service, deliveries, and credit; expense does not reflect the higher merchandise cost in self-serve stores, caused by a higher proportion of breakage, spoilage, and stock shortage.

TABLE 18.—CREDIT SALES—COMBINATION-STORE (GROCERY AND MEAT) CHAINS

	All chains reporting credit
Number of chains.....	148
Number of units.....	2,237
Units located in cities or places of more than 100,000.....	753
Units located in cities or places between 25,000 and 100,000.....	503
Units located in cities or places between 10,000 and 25,000.....	342
Units located in cities or places of less than 10,000.....	639
Net sales (1929).....	\$140,495,144
Average sales per unit.....	\$62,805
Credit sales.....	\$34,398,817
Per cent of credit to total sales.....	24.48
Total store-operating expenses.....	\$27,730,175
Per \$100 of sales.....	19.74
Pay roll.....	\$14,475,976
Per \$100 of sales.....	10.30
Other store-operating expenses (including rent).....	\$13,254,199
Per \$100 of sales.....	9.44
Rent, per \$100 of sales in such leased premises.....	2.66

TABLE 19.—SALES BY COMMODITIES—COMBINATION-STORE (GROCERY AND MEAT) CHAINS

	All combina- tion store chains	Three national chains having more than 2,500 units each	All other combina- tion store chains
Net sales (1929).....	\$2,381,827,445	\$1,474,475,398	\$907,352,047
Less amount which can not be broken down into com- modities.....	346,069,870	3,816,999	342,252,871
Sales further analyzed.....	2,035,757,575	1,470,658,399	565,099,176
	<i>Per cent</i> 100.00	<i>Per cent</i> 100.00	<i>Per cent</i> 100.00
Commodity.....			
Bakery products, fresh.....	4.25	4.49	3.86
Beverages, bottled.....	.74	.84	.58
Confectionery and nuts.....	1.38	1.67	.91
Delicatessen and ready-to-serve foods.....	.24	.10	.46
Fish and other sea foods, fresh.....	.57	.55	.61
Fruits and vegetables, fresh.....	12.11	13.91	9.17
Groceries (general line).....	57.11	56.11	58.76
Meats (including poultry).....	14.91	12.22	19.28
Milk and cream, fluid.....	1.56	1.52	1.63
Soda fountain sales and ice cream.....	.18	.06	.38
Sales of nonfood products.....	6.95	8.53	4.36
A further partial breakdown of two of the above classifications, based upon a coverage of about 10 per cent in the case of groceries, and 45 per cent in the case of nonfood products, is shown below:			
Groceries (general line).....	57.11	56.11	58.76
Butter and cheese.....	9.35	7.87	11.76
Eggs.....	4.92	4.39	5.78
Lard, cooking fats, etc.....	1.99	2.29	1.50
Flour.....	2.44	2.69	2.01
Sugar.....	6.23	5.88	6.78
Canned goods and other groceries.....	32.18	32.99	30.93
Nonfood commodities.....	6.95	8.53	4.36
Cigars, cigarettes, and tobacco.....	3.12	3.94	1.77
Household supplies, general line.....	3.09	4.07	1.52
All other sales of nonfood products.....	.74	.52	1.07

TABLE 20.—KINDS OF STORES OPERATED BY COMBINATION-STORE CHAINS

[Food chains are classified as combination-store chains when a substantial part (more than one-third) of their business is done in combination grocery-meat stores, even though they also may operate many straight grocery stores and separate meat markets. Analysis of the sales of chains classified as combination-store chains discloses the following proportions of each kind of store, with the corresponding sales]

	COMBINATION-STORE CHAINS				
	Totals, all such chains	Of less than 26 units	Of 26 to 100 units	Of 100 to 1,000 units	Of more than 1,000 units
Total number of units of all kinds.....	41,136	3,121	1,341	6,142	30,532
Straight grocery stores.....	21,625	199	178	2,482	18,766
<i>Per cent of total.....</i>	<i>52</i>	<i>7</i>	<i>13</i>	<i>40</i>	<i>61</i>
Separate meat markets.....	370	77	75	171	47
<i>Per cent of total.....</i>	<i>1</i>	<i>2</i>	<i>6</i>	<i>3</i>	<i>1</i>
Combination stores.....	19,141	2,845	1,088	3,489	11,719
<i>Per cent of total.....</i>	<i>47</i>	<i>91</i>	<i>81</i>	<i>57</i>	<i>38</i>
	(THE SALES FIGURES BELOW ARE IN THOUSANDS OF DOLLARS)				
Total sales, all units.....	\$2,381,827	\$241,271	\$75,605	\$257,320	\$1,807,631
Straight grocery stores.....	\$1,098,319	\$13,646	\$7,729	\$83,847	\$993,097
<i>Per cent of total.....</i>	<i>46.1</i>	<i>5.6</i>	<i>10.2</i>	<i>32.6</i>	<i>54.9</i>
Separate meat markets.....	\$13,987	\$4,439	\$3,400	\$5,093	\$1,055
<i>Per cent of total.....</i>	<i>0.6</i>	<i>1.8</i>	<i>4.5</i>	<i>1.9</i>	<i>0.1</i>
Combination stores.....	\$1,269,521	\$223,186	\$64,476	\$168,380	\$813,479
<i>Per cent of total.....</i>	<i>53.3</i>	<i>92.6</i>	<i>85.3</i>	<i>65.5</i>	<i>45.0</i>

CENSUS OF DISTRIBUTION

TABLE 21.—FISH-MARKET CHAINS

A. SUMMARY

ITEM	Amount
Number of chains.....	12
Number of units.....	51
Net sales (1929).....	\$1,540,415
Average sales per unit.....	\$30,204
Total store operating expenses.....	\$564,102
Per \$100 of sales.....	36.62
Pay roll.....	\$327,417
Per \$100 of sales.....	21.26
Other store operating expenses, including rent.....	\$236,685
Rent, per \$100 of sales.....	4.39
Operating expense, per \$100 of sales.....	10.97
Full-time employees.....	183
Full-time salaries and wages.....	\$307,254
Part-time employees.....	42
Part-time salaries and wages.....	\$20,163
Distribution of sales by commodities: <i>(Coverage 33.28 per cent)</i>	<i>Per cent</i>
Total.....	100.00
Fish and sea foods.....	95.25
Fresh fruits, vegetables and groceries.....	4.75

B.—SALES CLASSIFIED BY SIZE OF CITY

	Number of units	Net sales (1929)	Per cent of total sales
Total.....	51	\$1,540,415	100.00
Cities with population of—			
More than 100,000.....	39	1,317,237	85.5
25,000 to 100,000.....	10	193,427	12.6
10,000 to 25,000.....	1	24,951	1.6
Less than 10,000.....	1	4,800	.3

C.—SALES CLASSIFIED BY GEOGRAPHIC DIVISION

DIVISION	Per cent to total net sales
Total.....	100.00
New England.....	45.00
Middle Atlantic.....	15.00
East North Central.....	10.00
South Atlantic.....	30.00

D.—SALES CLASSIFIED BY DATE OF ESTABLISHMENT

	Number of units	Per cent to total units
Total.....	51	100.00
All units established in—		
1929.....	8	15.68
1925 to 1928.....	14	27.45
Previous to 1925.....	29	56.87

TABLE 22.—GROCERY-AND-DRY GOODS CHAINS

Number of chains.....	10
Number of units.....	187
Net sales (1929).....	\$11,331,102
Average sales per unit.....	\$60,594
Total store operating expenses.....	\$1,692,097
Per \$100 of sales.....	14.93
Pay roll.....	\$897,684
Per \$100 of sales.....	7.92
Other store operating expenses, including rent.....	\$794,413
Per \$100 of sales.....	7.01
Rent in 144 leased premises per \$100 of sales in such leased premises (included in previous item).....	2.32
Full-time employees.....	852
Full-time salaries and wages.....	\$879,205
Part-time employees.....	100
Part-time salaries and wages.....	\$18,479
Distribution of sales by commodities:	
Total.....	<i>(Coverage 33.80 per cent)</i>
	<i>Per cent</i>
	100.00
Groceries.....	59.68
Meat.....	4.41
Delicatessen and ready-to-serve foods.....	1.38
Fruits and vegetables.....	.21
Bottled beverages.....	.27
Confectionery and nuts.....	.11
Dry goods.....	32.16
Men's and women's clothing.....	1.43
Shoes.....	.35

NOTE.—Ninety-four per cent of the units with 92 per cent of the sales are in places of less than 10,000 population.

TABLE 23.—GROCERY-AND-FEED CHAINS

Number of chains.....	9
Number of units.....	44
Net sales (1929).....	\$3,372,472
Average sales per unit.....	\$76,647
Total store operating expenses.....	\$330,436
Per \$100 of sales.....	9.8
Pay roll.....	\$192,636
Per \$100 of sales.....	5.7
Other store operating expenses, including rent.....	\$137,800
Per \$100 of sales.....	4.1
Rent in 26 leased premises per \$100 of sales in such leased premises (included in previous item).....	1.55
Full-time employees.....	146
Full-time salaries and wages.....	\$184,577
Part-time employees.....	38
Part-time salaries and wages.....	\$8,059
Distribution of sales by commodities:	
Total.....	<i>(Coverage 27.54 per cent)</i>
	<i>Per cent</i>
	100.00
Groceries.....	64.62
Meats.....	5.74
Fruits and vegetables.....	3.82
Bakery products.....	.35
Nonfood products.....	.48
Hay, grain, and feed.....	24.99

NOTE.—Eighty-two per cent of the units with 85 per cent of the sales are in places of less than 10,000 population.