

increases of chains compared to those of independents were 137.3% to 33.6% from 1972-75. Men's clothing store chains account for appreciably fewer sales than independent merchants, but from 1972 to 1975 chains in this category recorded sales increases of 71.9% compared with 17.7% for independents. Similar increases in the strength of chains can be observed in shoe stores, women's clothing stores, family clothing stores, book and stationery stores, and sporting goods and accessories stores. In each case, the sales increases of chains compared to those of independents were much higher in the 1972-75 period.

Table 18.3 illustrates the relative importance of chains by kind of business and the trends from 1972 to 1975. The percentages shown in this table represent the chains' share of the market, the balance being accounted for by the independents. In 1975, chain stores accounted for 42.5% of the total market (and independent stores for 57.5%) compared to 40.4% in 1972. The largest change occurred in book and stationery stores where chain stores increased their market share from 26.1% in 1972 to 45.9% in 1975. Family clothing store chains increased their market share from 31.7% in 1972 to 43.3% in 1975. The largest declines in the market share of chains occurred in specialty shoe stores, where they dropped from 53.9% in 1972 to 46.0% in 1975, and in hardware stores where the chains' share of the market fell from 20.2% in 1972 to 15.6% in 1975. Although chain stores have been steadily increasing their market share, independent stores still account for nearly 60% of all retail sales in Canada.

**Department stores.** Department stores (Table 18.4) have shown one of the most consistent and substantial growth rates of all categories of retail trade. Their sales were exceeded only by combination stores (groceries and meats) and motor vehicle dealers. In 1975, department store volumes reached \$5,786 million, excluding catalogue sales, an increase of 55.8% from 1972. The market share of department stores for 1975 was 11.3%.

The largest increases for departments within such stores in 1975 were recorded by jewellery (101.6%), hardware, paints and wallpaper (85.3%), photographic equipment and supplies (75.4%) and food and kindred products (73.7%). Nine departments recorded sales of over \$200 million, the highest of which was food and kindred products, \$330.9 million; followed by major appliances, \$313.3 million; furniture, \$289.8 million; men's clothing, \$279.3 million; women's and misses' sportswear, \$278.1 million; toiletries, cosmetics and drugs \$271.3 million; television, radio and music, \$245.5 million; men's furnishings, \$245.0 million; and housewares and small electrical appliances, \$210.4 million. The lowest increase in sales was recorded in piece goods (12.5%), while the department with lowest sales was millinery, \$16.1 million.

**New motor vehicle sales.** The largest homogeneous group of commodities sold through retail trade outlets is "new motor vehicles". In 1975, the \$7,261.0 million sales of new motor vehicles accounted for 70.0% of the retail business carried out by motor vehicle dealers and 14.2% of total retail sales.

Statistics Canada obtains new motor vehicle sales data monthly from both Canadian manufacturers and importers. These respondents supply data on both unit sales and dollar sales. The new motor vehicles referred to in this context are the passenger cars, trucks and buses sold by motor vehicle dealers to the public. Excluded are all export sales and domestic sales of motorcycles, snowmobiles and other all-terrain vehicles. Passenger cars include not only private cars but taxis and car rental fleets, and other passenger cars used for business and commercial purposes. "Commercial vehicles" refers solely to trucks and buses. Overseas manufactured vehicles include only those imported (some by Canadian and US manufacturers) in a fully assembled state from countries other than the United States.

Sales of new motor vehicles increased during 1975 to record levels (Table 18.5) for the fifth successive year, in terms of both number and retail value. The number of new passenger cars and commercial vehicles sold advanced 5.4% over