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AN ANALYSIS OF LOCATIONAL FACTORS  
OF WHOLESALING FUNCTIONS  
IN WINDSOR, ONTARIO  
WITH EMPHASIS UPON GROCERY WHOLESALERS

BY

GREGORY P. WILLIAMS

A THESIS  
SUBMITTED TO THE FACULTY OF GRADUATE STUDIES  
THROUGH THE GEOGRAPHY DEPARTMENT IN PARTIAL  
FULFILLMENT OF THE REQUIREMENTS FOR THE  
DEGREE OF MASTER OF ARTS AT THE  
UNIVERSITY OF WINDSOR

WINDSOR, ONTARIO

APRIL, 1974

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## ABSTRACT

This study investigates the location of confectionary and grocery wholesalers in the Windsor Metropolitan Area. The study of the wholesale function in Windsor is centered around the question of why Windsor is not the wholesale center one would expect since one of the prime features of wholesale distribution in North America is the heavy concentrations of establishments in the largest cities of highly productive regions. Two other questions answered are: Where are wholesalers in Windsor located and what locational factors are considered by wholesalers and what are the benefits derived from their locations? The study examines the various definitions and types of wholesaling. It also surveys the history of the City of Windsor with emphasis upon the wholesale function.

A questionnaire was distributed to all the grocery and confectionary distributors of the city and the resulting material was analyzed by a computerized factor analysis programme and by examining the other empirical data collected. The main findings of the paper are:

- 1) Windsor's absence of a strong wholesale function can be primarily accounted for by the city's inability to centralize regional wholesale establishments within its metropolitan limits.
- 2) Windsor does not have the characteristics of other more important wholesale centers in Canada.
- 3) The wholesalers of Windsor generally select their locations in a haphazard manner based on assumptions rather than fact.
- 4) There is a trend towards the decentralization and the vertical

integration of the wholesale function in Windsor.

- 5) It is unlikely that the importance of wholesaler trade in Windsor will increase substantially in the future.

#### ACKNOWLEDGEMENTS

I have long been interested in retail/wholesale trade probably due to the work of my father and the enthusiasm shown for the subject by Dr. Ransome of the University of Windsor's Geography Department. It was Dr. Ransome's lectures and conversations on the nature of the topic and his personal experiences which provided the incentive for the beginning of this research.

To Dr. J. C. Ransome, my research advisor at the University of Windsor, I wish to express my sincere gratitude for the many hours spent in helping me outline my research, in suggesting research techniques and in constructively criticizing my manuscript. I also wish to thank Dr. V. Smith and Dr. G. Romsa for their suggestions on the computer analysis, organization, working and encouragement to myself.

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## CHAPTER I

### THE AREA OF STUDY AND METHODOLOGY

#### AREA OF STUDY

It is the prime purpose of this study to analyze the importance of the wholesale distribution function as a central place indicator. The region selected is the City of Windsor, on a level site of 29,000 acres and with a population in 1974 of 232,724.

Southernmost of Canadian cities, the largest city on the Canada-United States border, Windsor is one of the most important economic areas of Canada. The city is located in southwestern Ontario on a peninsular extension of the province. The location is bounded immediately north and west by the Detroit River, the international boundary, and to the northeast by Lake St. Clair. These waterways link Windsor to the St. Lawrence Seaway System. The Detroit River is easily crossed by bridge, tunnels and ferries connecting Windsor and Detroit.

In spite of access to the St. Lawrence Seaway System and of being the only metropolis on the peninsula, Windsor is at a distinct disadvantage in developing as a central place. The adjacency of Metropolitan Detroit with a population of 4.2 million and its customs stations shut off the reach of Windsor functions to the north. The normal fanning out of distributive activities in all directions from a metropolitan center takes a more lopsided or truncated shape. The case of Windsor as an industrial satellite of Detroit further restricts its development as a fully separate and magnetic central place.

To the east, the cities of London (220,000) 120 miles away and

Toronto (2 million) 220 miles, shorten the tributary reach of Windsor, and each performs distributive functions which otherwise might in part at least belong to Windsor because of lack of major metropolitan competition.

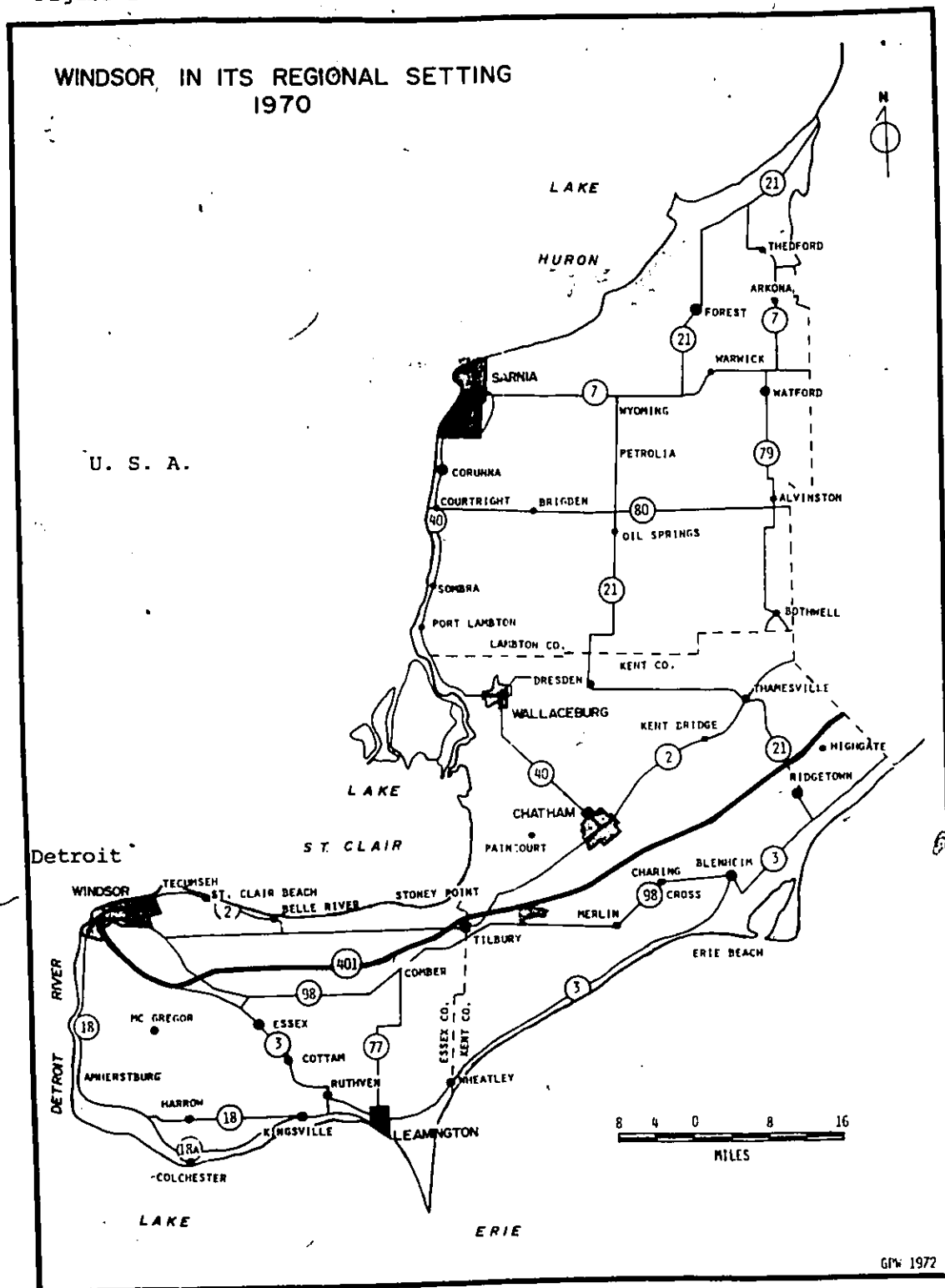
However, Windsor is a central place even though not to the degree of Detroit. Their locations place them in the center of the manufacturing belt. Detroit is a more important strategic port in both a connective and terminal sense.<sup>1</sup> Windsor is also not a central place in the sense of London which has a large, symmetrical, uninterrupted hinterland. But Windsor is the largest city in the St. Clair Region (Essex, Kent and Lambton Counties) and as such it has more numerous and specialized functions than any other community in this Canadian hinterland.

While Windsor's central place functions are primarily of local importance, (e.g., serving the Windsor area, Essex County and, to a lesser extent, Kent and Lambton Counties), nevertheless the city is served by five railways, six major Canadian highways and two international airlines which allow some of its goods and services to be delivered to more distant markets.

Essentially, Windsor is a manufacturing city and its inability to function as a distinct central place is evident in the lack of key establishments related to a range of central functions, e.g., retail trade, wholesale trade, finances, personal services, amusements, communications, utilities, professional services and government.<sup>2</sup> This is especially evident when considering wholesale trade in Windsor. In the last wholesale census<sup>3</sup>,

1. Robert Sinclair, The Face of Detroit, Department of Geography, Wayne State University, Detroit, 1970, p. 30.
2. Harold Carter, The Study of Urban Geography. Edward Arnold Ltd., London, 1972, p. 92.
3. The last wholesale census in Canada was 1961.

Figure 1



1,859 persons were employed in 202 outlets in Windsor. Total wholesale sales were \$100,835,700 or \$882 per person<sup>4</sup> which was considerably below the provincial average of \$978 per person. These figures for Windsor not only represent a decline in the importance of wholesale trade in the city since 1951 but also a decline in population. Between 1951 and 1961 the population of Windsor dropped approximately six thousand persons to 114,367<sup>5</sup> and total wholesale sales declined by over fifteen million dollars, and sales per person dropped from \$965 to \$882.

In contrast to Windsor, the stronger central place of London, Ontario has shown constant growth both in population and in the importance of wholesale trade. In 1961, the population of London was 169,569 and wholesale trade employed 3,423 persons in 265 locations, having total

- 
4. These figures are representative of wholesale sales for the City of Windsor. When metropolitan population statistics are considered the per capita wholesale sales falls to \$521. This figure is not entirely accurate, however, due to the fact that the value of wholesale sales for Metro Windsor is unattainable. To arrive at the per capita figure of \$521, metro population statistics were used with the City of Windsor wholesale sales. The actual per capita figure is therefore somewhere between \$521 and \$882, but closer to the former, since in 1961, the value of wholesale sales from the area of Metro Windsor not included in the City of Windsor would be insignificant due to a lack of wholesalers in the fringe region.
  5. While the population of Windsor during this time period was declining the population of eight adjacent municipalities was soaring. This is clearly evident when in 1956, the city's population was reported at 121,980, representing only 65.6% of the population of the entire Windsor community (G. Nixon and M. Campbell, Four Cities. McClelland and Steward Ltd., Toronto 1971, p. 21). It was the growing trend to seek urbanism coupled with the suburbs dependency upon Windsor for employment and services which ultimately led to the annexation of the towns of Ojibway and Riverside and parts of the townships of Sandwich East, Sandwich South, and Sandwich West on January 1, 1966.

sales of \$212,305,000 representing sales of \$1,247 per person. These figures, with the exception of sales per person, all showed increases from 1951 when the population was 95,343 and wholesale trade employed 2,497 persons in 193 locations having total sales of \$133,022,200.

This supports the hypothesis that Windsor's development as a central place is seriously hindered by its location and by the associated competition.

#### METHOD OF STUDY

The following is an outline illustrating the sequence of research which resulted in the completion of this study.

1. A familiarization of the types and operations of wholesaling was gained by the reading of standard texts on wholesaling. This stage is especially important due to varying definitions of wholesaling.
2. In order to analyze wholesaling locations in depth, the area of study emphasizes Windsor's largest number of commodity wholesalers, that of grocery and confectionary suppliers. (Grocery and Confectionary being defined by the Standard Industrial Classification Manual). Other areas of wholesale trade are discussed, but in more general terms.
3. The history of wholesaling in Windsor was examined through local histories, old business and telephone directories, texts, brochures, essays, newspapers and interviews. The objectives of this search were to determine when wholesaling originated in Windsor, what its early importance was, how it was hindered in its early development by its proximity to Detroit, and where it was concentrated in the past.
4. Wholesaling was then examined in the 1941, 1951, and 1961 census of wholesaling to determine Windsor's importance as a wholesale center,



both locally and nationally. This was done in absolute terms of establishments, sales, and employees for all the mentioned years in an attempt to recognize any trends which developed in Windsor's wholesale function.

5. Maps were prepared of Windsor showing the location of all Windsor wholesalers as taken from the lists in the Windsor Classified Telephone Directory. These maps were used in analyzing the wholesale locations, their spatial distribution and movement trends.
6. A questionnaire was prepared, (Appendix A), and was distributed to all of the grocery and confectionary distributors as listed in the telephone directory. Special attention in the questionnaire was given to establishing the reasons for past and present locations.
7. The material from the questionnaire was then analyzed by the use of factor analysis and by examining the other empirical data collected. The interpretation of the information from these studies provides the dominant generalizations of this thesis.

## CHAPTER II

THE CHARACTER OF WHOLESALINGSTATE OF LITERATURE

Comparatively little has been written on wholesaling in Canada from a geographical or marketing viewpoint. Donald Bowersox illustrates this when he writes, "physical distribution, one of the oldest facets of commercial enterprise, has historically been one of the most neglected of business subjects".<sup>6</sup> The point, however, may have been best stated by the late Paul Converse:<sup>7</sup>

... in the study of marketing and the operation of marketing departments and businesses a great deal more attention is paid to buying and selling than to physical handling. In fact the physical handling of goods seems to be pretty much overlooked by sales executives, advertising men and market researchers.

... problems of physical distribution are too often pushed aside as matters of little importance. I have for years been reading business and economics magazines. Such publications over the years have devoted relatively little space to physical distribution.

This is in spite of the importance wholesaling plays in the economic structure. For example, wholesaling, including sales of manufacturers' sales branches represents half of the Canadian G. N. P.<sup>8</sup> In Canada in 1961, there were 26,500 wholesaling establishments which produced

6. D. J. Bowersox, "Physical Distribution Development, Current Status and Potential" in Concepts and Canadian Cases in Marketing, ed. Murray Preshing and Yaworsky. Longman, Canada, Don Mills, 1973, p. 293.

7. Ibid., pp. 293-4.

8. B. Mallen, Marketing in the Canadian Environment, Prentice-Hall of Canada Ltd., 1973, p. 232.

a total sales volume of \$19,739,946,500.<sup>9</sup> These distributors employed 248,536 persons who were paid a total of \$1,034,867,300 in wages.<sup>10</sup>

The lack of material dealing with wholesaling can be attributed partly to the fact that relatively few persons are employed in wholesaling compared to other urban functions. Other functions, such as retailing or manufacturing are much larger employment sectors and have received more attention. Bowersox adds another major factor for the neglect and late development of physical distribution.<sup>11</sup>

Prior to the time that computers emerged from infancy and before applied analytical tools were generally at the disposal of business, there was no reason to believe that an overall attack on physical distribution activities would accomplish improved performance.

Finally, Beckman and Engle summing up the reasons for the lack of wholesale literature state:<sup>12</sup>

1. Probably the most important of these is the complexity of the subject ... as it is difficult even to arrive at a satisfactory definition of wholesaling much less analyze its structure and functioning.
2. A second reason for neglect, both by the general public and economists is the persistence of certain misconceptions about wholesaling. Among the more important of these are:
  - a) the belief that wholesaling is confined to the operations of wholesalers.
  - b) the belief that the wholesaler is an anachronism.
  - c) the belief that wholesaling differs in no important way from retailing in so far as internal management and operation are concerned.

9. Census of Canada, "Wholesale Trade Establishments, General Statistics" Queens Printer, Ottawa, 1966, p. 14-1.

10. Ibid.

11. Bowersox, p. 294.

12. J. Beckman and N. Engle, Wholesaling, The Ronald Press Company. New York, 1937, pp. 12-13.

3. A third contributing factor to neglect of wholesaling lies in the fact that the operations of wholesale establishments, unlike those of retail stores, are not open to public observation.

#### DEFINITION OF WHOLESALING

Rather thorough definitions of wholesaling have existed for over thirty years. T. N. Beckman and N. H. Engle in 1937 published their treatise, Wholesaling. It is a factual and analytical study which broadly defines wholesaling as follows:

Wholesaling includes all marketing transactions in which the purchaser is actuated solely by a profit or business motive in making the purchase and if the goods are bought from a concern operating substantially as a retail establishment and such goods are not intended for resale, the quantity is materially in excess of that which might reasonably be purchased by an ultimate consumer. 13

Although their work has been attacked for too broadly defining wholesaling, the authors have left the definition unchanged through two later editions, the most recent being published in 1959.


The work of Beckman and Engle is a landmark in the study of wholesaling as it represents the first full-scale investigation into the industry. Prior to that time there had been a sparse literature concerned mainly with the entrepreneurial aspects of the trade.<sup>14</sup> In their work they established definite criteria to differentiate wholesale trade from retailing.

In formulating a scientifically correct or theoretically sound definition of a wholesale transaction, consideration must be given to three criteria including:

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13. J. Beckman and N. Engle, Wholesaling, The Ronald Press Company, New York, 1937, p. 31.

14. J. E. Vance, Jr. The Merchant's World: The Geography of Wholesaling. Prentice-Hall, Inc.; Englewood Cliffs, 1970, p. 23.



1. Status or motive of the purchaser, ie., the customer and his purpose in making the purchase.
2. Quantity of goods involved in the transaction.
3. Method of operation of the concern.<sup>15</sup>

In the only other complete book on the subject<sup>16</sup>, David Revzan in his Wholesaling in Marketing Organization states that

The orthodox marketing definition of wholesaling generally stresses, among other things, the nature and motivation of the buyer as the single most important criterion. Based on this criterion, wholesaling may be defined as that part of marketing in which goods and services move to various classes of buyers who will: (1) engage in the resale of such goods and services with profits in mind; (2) use the goods and services in order to facilitate the production of other goods to be sold with profits in mind; or (3) use the goods<sup>17</sup> and services for various institutional purposes.

As can be seen in the definitions of Beckman and Engle and Revzan the term wholesaling can take on many meanings. In the United States for example, there exists varying definitions for the purposes of different laws as well as for varying statistical purposes. A State Tax Commission must interpret what constitutes a wholesale transaction or a wholesale establishment in its enforcement of a retail sales tax law. In addition to this, the Federal Trade Commission, U. S. Bureau of the Census, the Bureau of Labour Statistics and the Office of Business Economics of the U. S. Department of Commerce all define wholesale trade in varying fashions.<sup>18</sup>

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15. Beckman and Engle, p. 17.

16. Vance, p. 44.

17. David A. Revzan. Wholesaling in Marketing Organization. Wiley, New York, 1961, p. 2.

18. Beckman and Engle, 1959 ed., pp. 18-19.

In Canada, there is not as much confusion in defining wholesaling as the definition in the Wholesale Trade Census is generally accepted by lawmakers and statisticians. The definition of wholesaling used by the Canadian Census is very similar to that used by the U. S. Bureau of the Census with the former being "wholesaling in general covers establishments selling merchandise to others for resale and to industrial and commercial users"<sup>19</sup> while the latter states that

The major group includes establishments or places of business primarily engaged in the selling of merchandise to retailers; to industrial, commercial, institutional, or professional users; or to other wholesalers, or active agents in buying merchandise for or selling merchandise to such persons or companies.<sup>20</sup>

A problem which is contiguous with defining wholesaling is that of defining the number and the types of wholesalers. This seems to vary with the particular author. Vance states that there are four types of wholesalers while Beckman and Engle use six categories and Revzan discusses fifteen types. The Canadian Census has six major classifications of wholesalers and twenty-five sub-groupings (Appendix B). The prime classifications are: wholesalers proper; petroleum bulk tank stations; assemblers of primary products; manufacturers' sales branches and offices; agents and brokers and other types of operation.<sup>21</sup>

#### REFERENCES, LITERATURE AND SOURCES OF DATA

The census in Canada is the primary source of actual data for wholesale trade. The census catalogues information by geographic areas:

19. Census of Canada, "Introduction to Wholesale Trade, 1961, Vol. 6, p. 2-1.
20. Standard Industrial Classification Manual. Office of Statistical Standards, Washington, 1967, p. 222.
21. Census of Canada, "Type of Operation Descriptions for Wholesale Trade 1951, Vol. VII. Appendix A, pp. A-3, A-4.

cities; provinces and total Canadian figures; kinds of businesses; types of operation; number of establishments; sales; value of goods handled; total revenue; sales and excise taxes; year-end inventories; number of working proprietors and paid employees.<sup>22</sup>

A problem which makes wholesaling research more difficult is the fact that in Canada, the wholesale census is accomplished only decennially. In the U. S., the census of wholesale trade is accomplished every four to six years.

More general statistics can be found in the Canada Year Book which gives a fairly recent accounting of "Sales of Wholesale Merchants By Kind of Business" and the Financial Post Survey of Markets. This latter source gives the percentage of change in wholesale sales for the previous year by main commodity type, but neither gives figures for individual cities or provinces.

Another problem which stems from the census statistics is the inclusion of sales from manufacturers' sales branches with the wholesale census. The problem seems to be based around the relation between wholesaling and manufacturing and manufacturing supplies. This is evident in the 1961 wholesale census where the total wholesale trade figures include the sales of only about 20 per cent of manufacturers' sales branches. Apparently 3,475 manufacturers' sales branches did not find it possible to report "the full range of census data", and therefore, they were excluded from the wholesale statistics and "are now considered part of the manufactured plant or plants served by them."<sup>23</sup> In the study of a manufacturing city

22. For more information on the Census of Wholesale Trade, see Appendix C.

23. S. G. Peitchines. "What Does the Future Hold For the Canadian Wholesaler in Marketing Canada second edition. ed. Mullen and Litvak. McGraw-Hill of Canada, Toronto, 1968., p. 266.

such as Windsor this could be a significant consideration in an overall view of the importance of wholesale trade to the city.

As has been mentioned, there exists a lack of studies pertaining to wholesale trade. A fundamental example of this is the lack of studies involving location theory.

Christaller has provided an analytical system for explaining where retail trade and services should locate based on the threshold and range of a good. His theory has a major flaw when considering wholesale trade - the omission of the concept of accumulation which is evident when he fails to make a comment on the period of trade.<sup>24</sup> Vance, in pointing this out, restates central place theory as trade-center theory using three elements of analysis - lower range of a good (threshold), upper range of a good and demand accumulation.<sup>25</sup>

Alfred Weber, like Christaller, provided an analytical system, valuable in explaining where industry would locate.<sup>26</sup>

Weber's work using the micro-economic approach establishing a methodical framework for the selection of an optimal location for an individual establishment is more applicable to wholesale location than that of Christaller's. It was however only August Losch of these great location theorists who writes of large-scale distribution in his The Economics of Location and then only in a very general frame.<sup>27</sup>

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24. Vance., pp. 58-59.

25. Ibid., p. 60.

26. Alfred Waker, Theory of the Location of Industries, trans. Carl Fredrich. University of Chicago Press, Chicago. 1929.

27. Vance., pp. 22-23.



Thus as Vance states

... so far theoretical constricts seeking to explain the location of economic activity have related only to production and retailing, not to wholesaling.

and

... understanding the location of wholesale trade and the fundamental forces that shape it, requires the reformulation and enlargement of existing location theory. 28

Most wholesale studies which have been completed, other than segments in city plans (which seldom even differentiate between wholesale and storage) are analysis of the local central market with recommendations for expansion or relocation. An example of this type of study is C. D. Phellips' Organization of the Louisville Wholesale Fruit and Vegetable Market, 1959, With Changes Since 1936.<sup>29</sup> This study discusses the importance of the Louisville Market; its market terminal and its problems; the organization of the market; its sources of supply and distribution and a final chapter which attempts to forecast future prospects.

Another example of a wholesale study is one of a specific wholesale firm, Hannaford Brothers Company: A Modern Food Wholesaling Firm in New England by Saul Cohen and Bernard Kane, Jr., in 1964.<sup>30</sup>

This type of study is uncommon because the material required is generally confidential and distributors are reluctant to release it. The

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28. Vance, pp. 22-23.

29. C. D. Phellips, Organization of the Louisville Wholesale Fruit and Vegetable Market, 1959, With Changes Since 1936. University of Kentucky, Lexington, 1960.

30. S. Cohen and B. Kane, Jr. "Hannaford Brothers Company: A Modern Food Wholesaling Firm in New England", in Focus on Geographic Activity. ed. Shoman and Patton. McGraw-Hill Book Company, Toronto., 1964, pp. 172-177.

study analyzes the company territory and market subdivisions. It discusses operational techniques and innovations as well as response to a changing market and competitive conditions.

In Canada, other than the census, very little has been written on wholesaling. What has been written is primarily found as a chapter in marketing texts or studies of the service industries. Two such mentions of wholesale trade are found in The Service Industries<sup>31</sup> by the Bank of Montreal for the Royal Commission on Canada's Economic Prospects completed in 1956 and the other is "The Functional Structure of Canadian Cities: A Classification of Cities", by J. W. Maxwell. One noteworthy characteristic of both these studies is that neither was written specifically about wholesaling.

Maxwell's study is primarily a means of comparing and classifying Canadian cities. This he does using 80 incorporated urban centers of over 10,000 in the census year 1951. Of wholesale trade, he states:

Wholesale trade, while requiring the concentration of facilities and people for its performance, is essentially a function of space. It is concerned with the collection, transfer and distribution of goods. It can be expected therefore to reach its highest levels of relative importance in those areas where extensive activities are of prime importance. Such is the situation in the eastern and especially the western periphery. 32 ... The cities in these areas reflect in their functional profiles this involvement with distance, and have central place functions ranking high in their structures. 33

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31. Bank of Montreal, The Service Industries, The Royal Commission on Canada's Economic Prospects, 1956.

32. Maxwell divides Canada into two regions, the heartland and the periphery. The heartland-Great Lakes St. Lawrence Basin, all else - the periphery.

33. J. W. Maxwell, "The Functional Structure of Canadian Cities. A classification of Cities", in Geographical Bulletin, Vol. 7, 1965, pp. 98-99.

The heartland in Maxwell's classification is Canada's greatest concentration of the manufacturing function. It is an area of dense population providing easy access to markets, specializing in production, more opportunities for substitution of inputs and a guarantee of ample labour. This is the area in which Windsor is located, an area which historically developed early as a manufacturing belt and has continued to grow at an unparalleled rate.

As a result of Maxwell's study he found that cities with a high rating of distinctiveness in wholesale trade, which he termed a central place function, were, with few exceptions, all located in the periphery. The main cities having a high distinctive rating of wholesale trade in the heartland have a more diversified profile. In the heartland these cities are Toronto, Montreal and Owen Sound while in the periphery they are Vancouver, Penticton, Edmonton, Calgary, Lethbridge, Regina, Saskatoon, Winnipeg, Brandon, Moncton, St. John's, Charlottown, St. John and Fredericton.<sup>34</sup> In the heartland, other occupations overall tend to dilute the relative importance of wholesaling employment.

While Maxwell's study is primarily a classification of cities, the Bank of Montreal's The Service Industries analyzes the nature of wholesale trade in Canada. One of the more relevant problems of wholesale trade, according to the study, is that detailed information is quite difficult to obtain. This is chiefly because there is no central trade organization for the wholesale industry nor are there many organizations that can be called truly representative of any particular sector.<sup>35</sup> It discusses types of wholesalers, using the definition put forth by Statistics Canada: sales by type of wholesaler; and trends. Two very important trends

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34. Maxwell, p. 90

35. The Service Industries., p. 24.

are distinguished in this work:<sup>36</sup>

1. Methods of distribution in the industry are changing in order to reduce cost and increase efficiency. Some establishments have set up "cash and carry" outlets much like a super market.
2. There appears to be a trend toward integration on the part of manufacturers.

The study quotes an unpublished manuscript by Bearly and Segall; Wholesale Trade in Canada 1930 - 1951,<sup>37</sup> which suggests that there are three major factors influencing the integration by manufacturers:

1. The desire by manufacturers for tighter control over the distribution of their products;
2. The need for intensive and specialized selling efforts in certain technical lines;
3. Favourable cost conditions when the manufacturer produces a large variety of different products or when his particular products have a high unit value.

Presently, this integration trend has expanded beyond manufacturers and is now evident in most areas of wholesaling. This has a profound effect on profits and costs because an integrated manufacturer may be quite willing to permit the wholesaling section of enterprise to operate at a very small profit or none at all. The study concludes by re-emphasizing the trend to improved methods, including automation where feasible, stating that this will lead to increased productivity per man, and thus tends to hold down total numbers employed.<sup>38</sup>

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36. The Service Industries, p. 46.

37. This quote from Bearly and Segall is taken from The Service Industries., p. 34.

38. The Service Industries., p. 42.

### PRESENT DAY TRENDS IN WHOLESALING

In recent years, wholesaling has undergone significant changes. The most significant of these changes, places the wholesaler in a position where he faces many problems which even challenge his position in the distribution system. For example, wholesalers by their very nature do more than simply receive goods from the producer and pass them along to retailers. The functions of wholesalers include buying and selling; transportation, storage; risk bearing; financing; marketing information; standardization and grading and other lesser functions, i.e., incidental manufacturing and processing and product service.<sup>39</sup> It is this fact, that they have so many functions, which places their future in question. There are many reasons for this, the main one being:<sup>40</sup>

1. Producers feel that they can achieve greater efficiency in the distribution of their products if they were to perform the entire distribution function themselves.
2. The growing Canadian market is making it more economically feasible for manufacturers to set up their own distribution outlets.
3. Mergers are broadening product lines, to the point where wholly-owned distributive outlets are practical.
4. Producers' growing needs for more detailed market information are prompting them to extend their commercial reach closer to the final customer.
5. The retail explosion of chain supermarkets, cooperatives and discounters has made it possible for many retailers to assume wholesaling functions themselves.

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39. Beckman and Engle., pp. 8-10.

40. I. Litvak and P. Banting, "The Wholesaling Sector in Canada:", in Marketing Canada. Second edition. ed. Mullen and Litvak. McGraw-Hill of Canada, Toronto, 1968 pp. 253-254. and S. G. Pärtchines pp. 264-268

These trends could be given one of two titles; the vertical integration of the wholesale function or the effect of economies of scale.

From 1951 - 1961 some shifts within wholesale trade are significant, primarily the dramatic increase in wholesale merchants sales (98.9%) and the decline of mail order wholesalers sales (~67%).<sup>41</sup> This latter trend, Litvak and Banting state, is a result of the "proliferation of regional shopping centres and improved transportation, and the dramatic shift from commission wholesaling to buying on one's own account."

In addition, the expansion of the market has enabled many multi-product wholesalers to specialize in the distribution and service of individual lines of related products only and some to become associated with individual manufacturers and limit themselves to the exclusive distribution of their products.<sup>42</sup>

Finally, Beckman and Engle in discussing the locational trends of wholesalers illustrate still another change made evident in the study by Cohen and Kane, Hannaford Brothers Company: A Modern Food Wholesaling Firm in New England, namely, "a slight tendency ... toward some decentralization".<sup>43</sup> This has resulted in the increasing importance of highway transportation which has become more predominant for both incoming and outgoing shipments, with the truckload often replacing the carload as an economical unit.<sup>44</sup>

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41. Litvak and Banting. p. 256.

42. Peitchinis, p. 265.

43. Beckman and Engle, p. 308

44. Ibid., p. 317.

-The trends cited above concern changes in scale of operation, organizational structure, population distribution, and transportation. From smaller central place to larger central place, the effects of these trends will differ. Reference to these trends will be made with respect to Windsor wholesaling.

## CHAPTER III

INTRODUCTION TO WHOLESALING

The presence of wholesaling in earlier eras was one indication of how sophisticated an economy had become. As man shifted from subsistence agriculture to commercial agriculture he became more dependent upon others for his needs. Man's dependence on others led to traders gradually becoming more specialized and to take on the functions of "middlemen". From the trader who bartered with the farmer, assembled commodities, and sold this production to merchants in the towns, to the caravans of the east, the functions of the middlemen grew and produced widespread marketing institutions.

With this growing importance in the economic scheme of Europe and Asia, the wholesaler gradually began to accept more responsibility. In addition to buying and selling, wholesalers stored and transported goods. They interpreted the needs and wants of their market, occasionally supplied financial assistance to retailers, and eventually often fostered standardization and coding of goods. Thus, by the time that foreign settlers arrived on the North American scene wholesaling had developed as an indispensable part of the European marketing system.

In Canada, as European settlement gradually spread inland, wholesaling centres developed. Halifax, Québec City and Montreal controlled much of the early trade and large trading companies were both collectors and distributors of goods. Trading centres on the St. Lawrence - Great Lake Corridor emerged much later and the range and volume of wholesaling was very limited in the 18th century.



### THE DEVELOPMENT OF THE WINDSOR-DETROIT AREA

Man's activities in what could now be called the Detroit River agglomeration reach back to prehistoric Indian times. In the region there are a number of historic Indian sites. The influence of these earlier settlers is still with us today in the form of names - Pontiac and Tecumseh for example, and many of our major transportation routes more or less follow old Indian trails.

The first recorded ventures of white men into the region are that of two Sulpician priests who canoed to Sault Ste. Marie in 1670. The most celebrated early visitor, LaSalle, arrived nine years later in 1679. It was not until 1701, however, that a permanent white settlement was established at Detroit by Cadillac.

Cadillac's settlement at Detroit was to serve a twofold purpose for the French: firstly, to control the fur trade, and secondly and more important was its strategic military location. The French with their dream of an Empire recognized the importance of the Detroit River as being an integral part of the Great Lake system, a part easily controlled due to its narrowness. They also envisioned it as a continuation of the Mississippi River System.

Settlement on the south shore of the river was encouraged by the French through land grants. The British conquest of the area in 1760 had little effect upon the size of the south shore settlement as British supporters did not move to the area until after the American Revolution (1783). Until this time most development was on the north shore since it had superior overland connections.

During this period, Amherstburg developed as the principal urban center as a result of its strategic military location controlling the only

deep water channel leading from Lake Erie.<sup>45</sup> Thus, Windsor's early development was hindered by its proximity to Detroit (until 1796 and the implementation of Jay's Treaty, Detroit and Windsor were considered as one<sup>46</sup> as is evidenced on John Montresor's map of the Detroit River in 1763) and by the importance of Amherstburg.

Prior to 1830, Windsor's largest commercial establishment was an agency of the Northwestern Fur Company. By 1935 Windsor had three establishments which were considered wholesale in nature<sup>47</sup> as all three were classified in Documents<sup>48</sup> as being "warehouse and forwarding establishments". One of these, owned by Mr. J. Dougall, founded in 1830 actually advertised as being a dry good wholesaler selling imported merchandise from London, Manchester, Liverpool and Glasgow.<sup>49</sup> However, Windsor's development was further hindered in 1844 by a law which restricted aliens from holding and transferring lands in Upper Canada.<sup>50</sup> This law prevented Americans from investing funds on the Canadian side of the river.

Late 1853 and 1854, however, ushered in a new era for Windsor, as on December 22, 1853, the Great Western Railway reached Windsor and in 1854

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45. G. Nixon and M. Campbell, Four Cities. McClelland and Stewart Ltd., Toronto., 1971, p. 8.

46. M. J. Havran. The Growth of Windsor, Ontario, 1854-1900, unpublished M. A. Thesis. p. 1A.

47. These companies were basically retailers, but they had important assembling and redistribution functions.

48. Essex Historical Society Papers and Addresses. Vol. III Echo Print; 1921, pp. 40-41.

49. J. E. Painter, "Merchantile Interests of Windsor, A Review of Leading Business Firms", Essex Record. October 2, 1874.

50. Havran, p. 6A.



a legislative enactment again made it possible for aliens to hold and transfer lots in Upper Canada. The results of these events were significant for Windsor and Detroit. One of the area's major difficulties, as the Detroit Daily Advertiser stated, was

Winter's approach places Detroit back twenty years ... Winter shuts us up to all practical interest as thoroughly and fixes his embargo as inviolably as he did twenty years since. The telegraph alone remains to us a connecting link so frail and uncertain, and so unsatisfactory as to be little better than no link at all. 51

With the railway the Detroit press then announces that "Never more will our city be icebound during four or five months of the year."<sup>52</sup>

This rail made year-round connection of Detroit and Windsor with the east a matter of hours.

As the western terminus, Windsor began to grow rapidly in the years immediately following 1854. By the choice of Windsor for its terminus, instead of Amherstburg, the Great Western Railway did much to assure the position of Windsor as the future chief centre of population in Essex County. 53

In the early 1870's, a second railway, the Canadian Southern selected Amherstburg as its western terminus. This was, however, short-lived. As a result of the increasing importance of Detroit, the Essex to Amherstburg line was abandoned and one to Windsor constructed in its place. Thus as a direct result of the importance of Detroit, Windsor received a growth stimulus while Amherstburg's development was dealt a serious setback.

Prior to the completion of these railways, Windsor's main trade

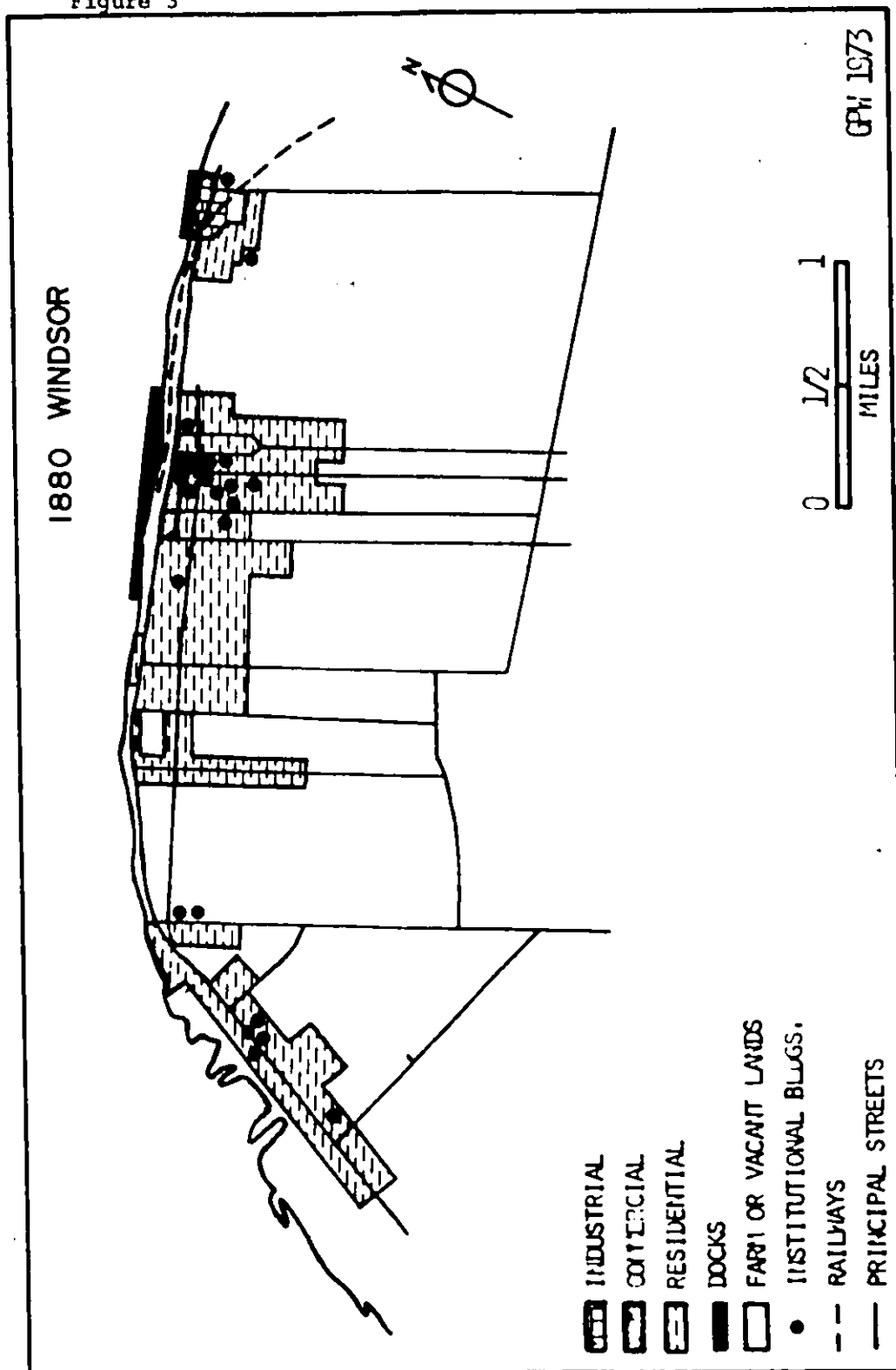
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51. N. F. Morrison, "Great Western Railway Centennial" in Radio Sketches of Periods - Events - Personalities from the History of Essex County - Detroit Area Transcriptions. Essex County Historical Association, 1963, p. 91.

52. Ibid., p. 92.

53. N. F. Morrison, Garden Gateway to Canada. The Ryerson Press, Toronto, 1954. p. 7.

Figure 3



orientation was northward with Detroit. A ferry service linked the two settlements as early as 1820. The railway served as Windsor's link with the rest of Canada, however, the Detroit Daily Observer saw in the railway, "the possibilities of Windsor becoming a Brooklyn to Detroit."<sup>54</sup> This statement emphasizes one of Havran's concluding statements in his thesis that "One might go so far to say that during the 19th century, Windsor was really more a part of the United States than Canada. Financially and commercially, the area about the Detroit River was one".<sup>55</sup> Trade between the cities was primarily in manufactured goods but it did include goods imported from England to Windsor and sold in Detroit.

#### WINDSOR'S GROWTH IN THE LATE NINETEENTH AND EARLY TWENTIETH CENTURIES

Between 1870 and 1890 most of the development in the Windsor area was a result of the railways. The Lake Erie, Essex and Detroit River Railway (now part of the Chesapeake and Ohio Railway) opened up and connected the rich agricultural areas of south Essex County to Windsor. The production of perishable fruits and vegetables promptly became more important as they could now reach their markets, Windsor and Detroit, more quickly.

The last major railway to reach Windsor, the Canadian Pacific, was completed in 1890. This gave Windsor a direct connection with the first transcontinental railway and it also led to the development of Windsor's salt industry. It was the desire of C. P. R. officials to find freight for their eastbound trains from Windsor that led to the organization of

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54. Havran, p. 6B

55. Ibid., p. 6B.

the Windsor Salt Company.<sup>56</sup>

Windsor's growth during the latter 19th century paralleled the Detroit River (Map 3) for two reasons: most of Windsor's commercial intercourse continued to be on the north-south axis with Detroit, and the terminal for the Great Western Railway (later to become the Canadian National) was located on the river front. This tended to concentrate growth along the river and this trend was reinforced by the arrival of the Canadian Pacific in 1890, which similarly had its terminal near the center of settlement.

With the increasing accessibility of Windsor to other parts of Canada, Windsor's commercial and industrial life began to expand. In 1858, the distillery of Hiram Walker and Sons Limited was established, followed by the dry good store of Bartlett, Macdonald and Gow in 1860, both of whom located near the river. This expansion of commerce led to a population expansion as the city expanded from 2,501 in 1861 to 4,253 in 1871. More marketing functions were thus needed and in 1879, the City Market was established on the present site of today. This was Windsor's second major retail/wholesale operation. The Market was important for both retailing and wholesaling in most farm goods ranging from fruits and vegetables to fodder and the distribution of coal and timber.

Coinciding with Windsor's growth as an industrial centre was its increasing importance in the transportation structure of the county. By 1910 the last major railway development was marked by the completion of the Michigan Central Tunnel linking Windsor and Detroit. This completed a railway network terminating in Essex County which had Windsor as its

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56. Garden Gateway to Canada., p. 8.

focal point. Map 4 illustrates the county rail development until 1920.

The expanding of the rail facilities had several notable effects on Windsor: it brought more industry and workers into the city and it caused the city to spread in a fan shape away from the river, where all economic development had taken place due to its proximity to Detroit. Windsor's economic development by the turn of the century was again reflected in the population increase.

Table 1

57

POPULATION OF WINDSOR, 1871 - 1921

1871	4,253
1881	6,561
1891	10,322
1901	12,152
1911	17,829
1921	30,668

Despite this growth, the population of Windsor and adjacent communities up to 1920 was too small to support many wholesale establishments or commodity lines. Windsor was the largest and most important city in the area but it was still primarily a small retail trade center receiving its goods primarily from the larger more important cities of Toronto and Montreal.

Wholesaling in Windsor during this time developed in distinct stages, which corresponded directly to the population size, manufacturing development, and transportation changes.

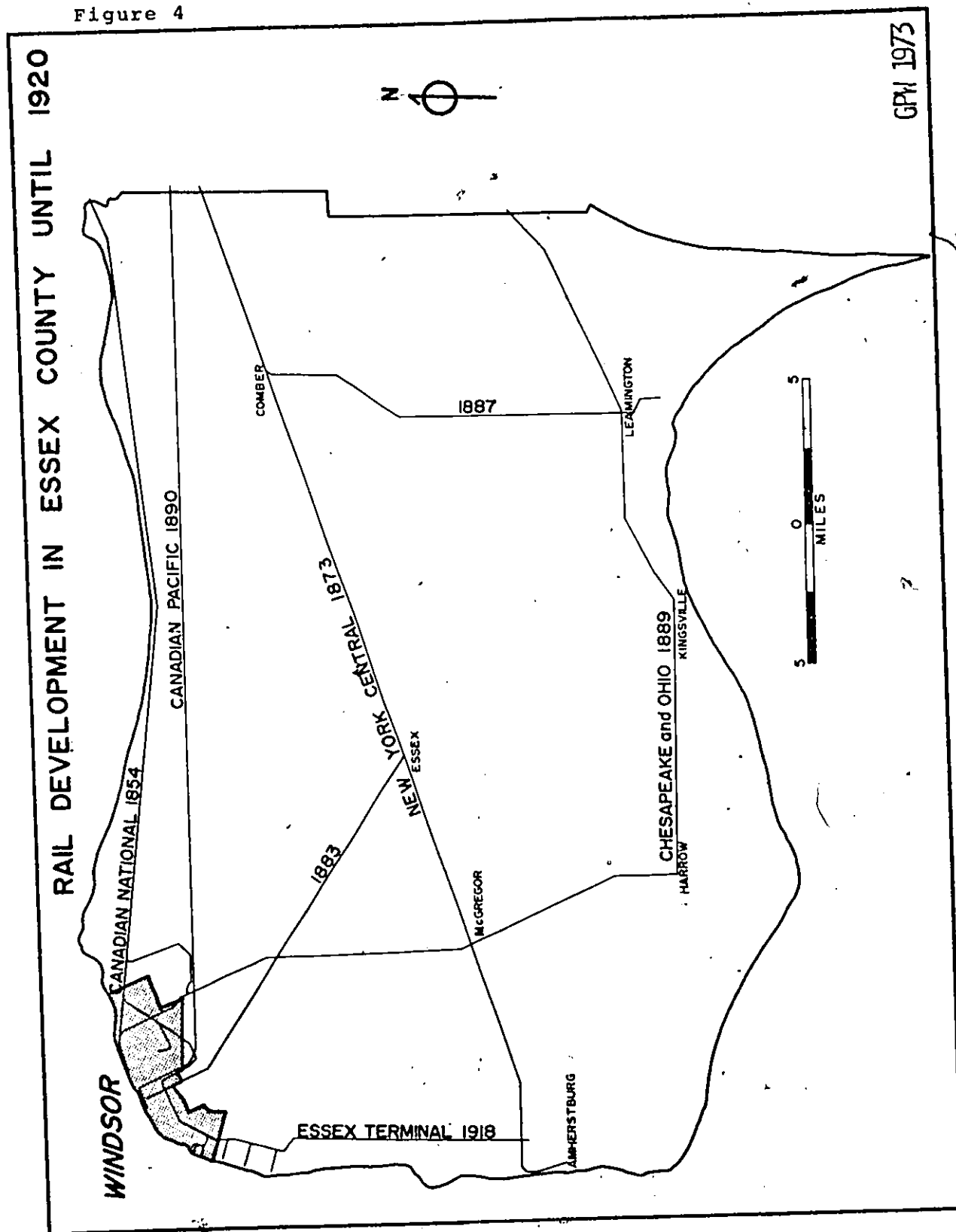
First Stage - Until the mid 19th century, wholesaling in Windsor was primarily made up of dry goods and agricultural commodity distributors. The population of Windsor at that time was small and dependent upon Detroit for many commodities. The entire population of Essex County in 1851 was

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57. Adapted from the Census of Canada "Population Statistics" for the years 1871; 1881; 1891; 1901; 1911; and 1921.



Figure 4



16,817 and only 4 of these were classified as storekeepers, (combined retail and wholesale) in Windsor.<sup>58</sup>

Second Stage - This stage has three parts: one beginning in 1854; a second in 1879; and a final one in the early 1900's. With the completion of the railway in 1854, fruits, vegetables, and produce could be assembled in Windsor from the county and from as far as the Niagara Peninsula without spoiling. This assemblage of agricultural products brought the establishment of produce distributors to Windsor.

Until 1876, the basement of the town hall and two other scattered lots served as market grounds.<sup>59</sup> However, by 1896, the expansion of the city and the growth of population made these market accommodations inadequate. This led in 1879 to the building of a centralized city market on a site immediately east of the Downtown center which it still occupies today.

The market was primarily a retail market built to serve the growing population of Windsor.

Every weekday the market operated from 5 a.m. to 8 p.m. and on Sunday it was open from 5 a.m. to 11 a.m. ... The products sold at the market exemplified the produce most often purchased by Windsor's residents. Unlike our own age, firewood, coal, hay and fodder were offered. ... fresh and smoked fish, poultry, or any animal meat as well as vegetables were exhibited for sale. Abundant supplies of wheat, barley, rye, corn and other grains were also available. 60

The final part of the second stage of wholesale development was the improved technology in the field of agricultural techniques in the

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58. Census of Canada, 1851, p. 522.

59. Havran, p. 37D.

60. Ibid., p. 38D.

early 20th century. Mechanization of agriculture, coupled with better seed and fertilizer, resulted in the forming of cooperative marketing organizations and the construction of storage bins in Windsor, in an effort to cope with larger and surplus crops.

Third Stage - The third stage began in 1904 with the expansion into Windsor of American automobile manufacturers. The manufacturing of the motor vehicle and its service industries developed a new line of wholesaling in Windsor, that of machinery, automotive equipment, accessories and parts. This sector has evolved to become one of Windsor's largest functions with over forty wholesalers and manufacturers of automobile parts and supplies existing in the city.

With the implementation of the motor vehicle and the resultant increased mobility, the city began to take on a new appearance. Expansion away from the river was now more feasible than ever before. New roads were built, a task made simple by the levelness of the area, and residential and commercial development began to decentralize.

By 1921, Windsor's population had reached 30,668, an increase of 12,839 since 1911. However despite the city's expansion, the wholesaling sector was still very weak as figure 2 indicates. These figures reveal that .24% of Windsor's total employment was involved in wholesale which was well above the national average of .06%. (This is not surprising since Canada was heavily agricultural then.) But when compared to other cities such as London, which had 2.2% of its employment in wholesale trade, Windsor's weakness in that sector is readily apparent.

One important development which was taking place in the wholesale sector at the time as a result of the industrial advancements and the increased mobility was the disappearance of the general wholesaler and the appearance of more specialized outlets. The dry good distributor was now

Table 2

A COMPARISON OF OCCUPATIONS

FOR WINDSOR, REGINA, LONDON AND VICTORIA - 1921

61

	<u>WINDSOR</u>	<u>VICTORIA</u>	<u>REGINA</u>	<u>LONDON</u>
Population	30,668	32,216	26,752	50,660
Work Force	15,946	16,241	14,649	24,773
AGRICULTURE	80	435	527	271
MANUFACTURING	5,598	2,221	1,578	7,977
CONSTRUCTION	1,970	1,399	1,211	1,729
TRANSPORTATION	1,861	1,969	1,514	2,809
TRADE	2,280	2,632	2,992	4,165
WHOLESALE	38	70	37	111
SERVICE	2,719	5,563	5,218	6,055

replaced by wholesalers who engaged more in wholesaling than retailing  
and who tended to specialize in a commodity line, i.e., textiles.

## CHAPTER IV

WINDSOR AND THE NATION

Windsor's location, as Map 5 illustrates, places it at the southwest corner of an area considered to be Canada's heartland. This area includes the St. Lawrence Lowlands and Southern Ontario. It enjoys excellent locational relationships for most manufacturing processes. The heartland area is Canada's greatest concentration of economic activity, financial power and population.<sup>62</sup> This concentration with its high degree of inter-city and intra-city linkage, has manufacturing as its dominant function. This concentration reflects easy access to market, allows specialization of production, provides more opportunities for substitution of inputs, and guarantees an ample labour supply.<sup>63</sup>

While the manufacturing function is focused on adding value to goods through their physical conversion, wholesaling is essentially a function of space and distribution.<sup>64</sup> Thus, as Jack Ransome states, "the size and growth of a wholesaling center rests primarily upon the degree to which it can centralize regional wholesale establishments within its metropolitan limits. This depends largely on the proximity and size of competing centers."<sup>65</sup> Using this as a criterion for a wholesale center, Windsor, as has been previously pointed out, is at a distinct disadvantage not only because of its location in the heartland, but also due to its proximity to Detroit.

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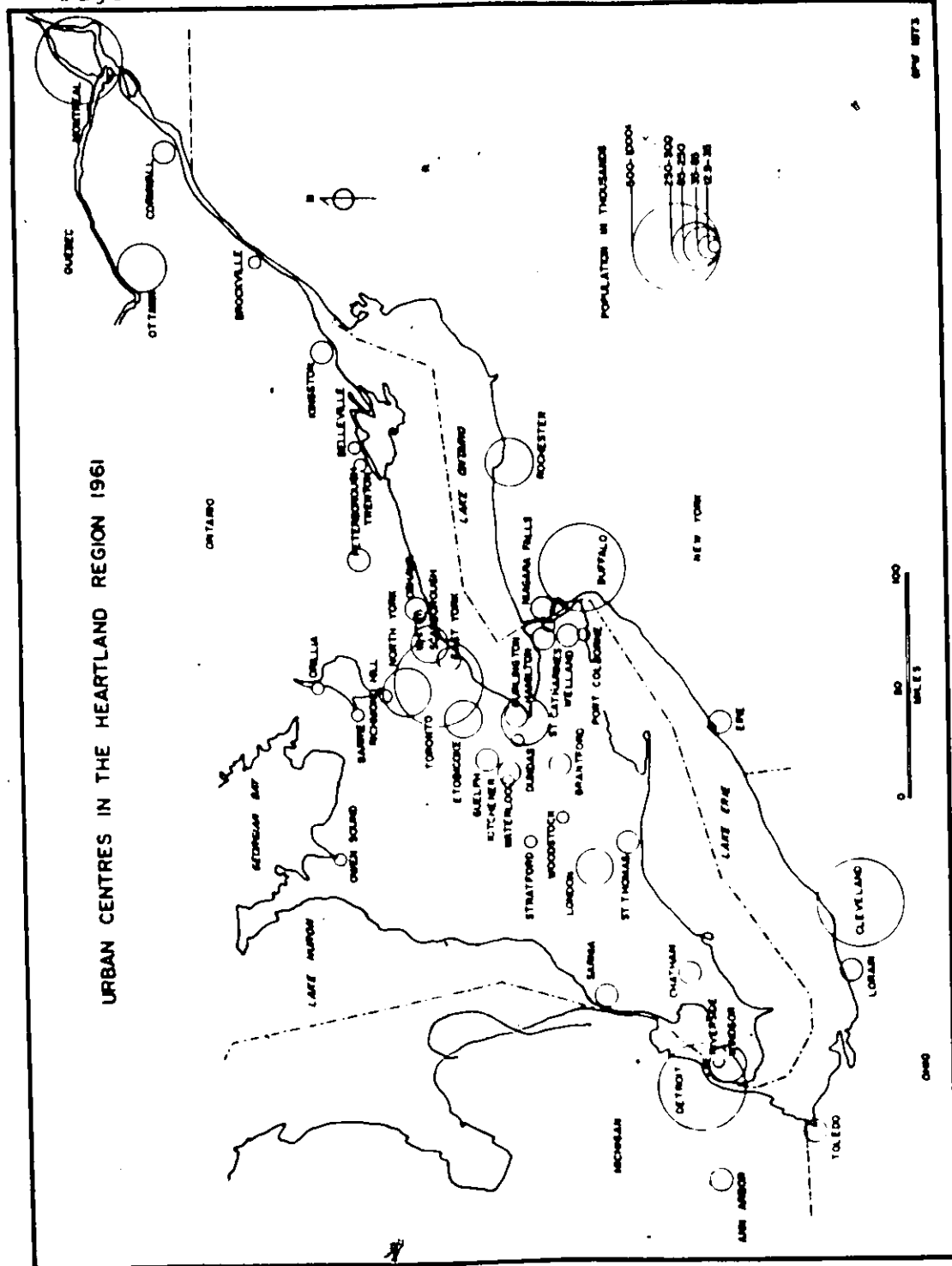
62. Maxwell, p. 92.

63. Ibid., p. 98.

64. Ibid., pp. 92-93.

65. J. C. Ransome, The Localization of Wholesaling in the Boston Metropolitan Area, Unpublished PhD Thesis, 1955. p. 335-336.

Figure 5



### WINDSOR'S DOMINANT FUNCTION

In studying Windsor, it is important to determine what the dominant function of the city is; where most of the people are employed; and to which groups most wages are paid. Windsor's economic characteristics can be compared to other Canadian cities and certain generalizations made as to the relative importance of wholesaling.

In analyzing Windsor's dominant function, several techniques can be incorporated.

- 1) J. W. Maxwell's "The Functional Structure of Canadian Cities: A Classification of Cities", is a study of Canada which as has been mentioned, includes all of Canada's incorporated urban centers as listed in the 1951 census. It was the purpose of this study to classify the cities in question by their functional structures. Primarily, three characteristics were used to typify city function structure, that is, "the city's dominant functions and its degree of functional specialization."<sup>66</sup>

The results of this study placed Windsor's dominant function as Manufacturing I. A dominant function of Manufacturing I is interpreted to mean that fifty percent or more of a city's excess employment<sup>67</sup> is accounted for in manufacturing. The classification of Windsor as a manufacturing center is not very surprising, especially in view of the fact that 43 of the 45 cities studied, located in the heartland, were in this same classification.<sup>68</sup> What is noteworthy, however, is the

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66. Maxwell, p. 85.

67. Excess employment means the employment in an urban area which is greater than the minimum requirement to maintain the viability of an urban area in its various sectors. Maxwell, p. 80.

68. Ibid., pp. 95-104.



fact that Windsor was given a Class I distinctive functional rating<sup>69</sup> in manufacturing with no other distinctive functions. This means that Windsor's value of excess employment in manufacturing is at least two standard deviations above the mean. By only giving manufacturing as a distinctive function for Windsor, Maxwell is stating that Windsor has no excess employment value for any function other than manufacturing.

In Maxwell's classification, no city studied had a dominant function of wholesale trade, however, eleven had a Class I distinctive function of wholesale trade. Only one city having a Class I distinctive function of wholesale trade was located in the heartland, i.e., Owen Sound, while the remainder were located in the periphery.

The cities located in the periphery which fall into this distribution center category are Brandon, Saskatoon, Calgary, Winnipeg, Regina, Vancouver, Charlottetown, St. John, St. John's and Fredericton. These cities were most concerned with collecting, transferring and distributing goods. It is in these cities that central place distributive functions show their greatest strength.<sup>70</sup> Eight of the ten also have retail trade as a distinctive function, while six of the ten also have transport as a distinctive function. Nine of the cities have finance as a distinctive function and eight rate business

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69. Class I distinctive function includes all cities whose value of excess employment for the function under consideration is equal to the mean value of excess employment for the function, plus a value of at least two standard deviations above the mean. Cities have as many distinctive activities as they have excess employment values. Maxwell, pp. 86-87.

70. Maxwell, pp. 97-104. For a chart of these cities, see Appendix D.

service as a distinctive function. Finally, six of these cities are provincial capitals.

By comparison, Windsor lacks most of the functional characteristics which these city groups appear to have in common. Other Canadian cities are distinguished as being stronger central places. Windsor, with its proximity to Detroit functions less as a retailing, wholesaling, and financial central place, and relatively more as a manufacturing center. Both retailing and finance are important to wholesale trade and Windsor's lack of these functions is an indication of the city's importance as a central place. Windsor's shortcomings in these key central place activities could be indicative of leakage to other cities. Detroit, for example, has been in the past, and to a lesser extent now, a favourite shopping area for Windsorites. But Chatham, London and Toronto are also cities where Windsorites shop. All have, according to Maxwell, more central place functions than Windsor.<sup>71</sup> This lack of strong retail and finance functions in Windsor means that Windsor's merchant wholesalers would also be more limited.

- 2) Another method of investigating Windsor's importance as a national wholesale center is by comparing Windsor's wholesale sales with those of other cities. Figure 3 lists Canada's fifteen largest cities with their wholesale sales, the percentage of Canada's total wholesale sales that

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71. Maxwell, pp. 101-102. According to Maxwell, Chatham's dominant function is Manufacturing II while the city has distinctive functions of public relations; retail trade; recreation; construction; transportation; wholesale trade; finance; community service; business service and personal service. London has a dominant function of manufacturing II and distinctive functions of finance; public utilities; construction; wholesale trade; community service and government service. Toronto has a dominant function of manufacturing I and distinctive functions of public utilities; wholesale trade and business service.

TABLE 3 72

CANADA'S FIFTEEN LARGEST CITIESWHOLESALE SALES, PERCENTAGE OF CANADA'S TOTAL WHOLESALE SALESAND PER CAPITA SALES, 1961

<u>City</u>	<u>Population</u>	<u>Wholesale Sales</u>	<u>Per Capita Wholesale Sale (\$)</u>	<u>RANK</u>	<u>Percent of Total Canada Wholesale Sales</u>	<u>RANK</u>
MONTREAL	1,191,062	2,408,964,200	2,023	(8)	12.38	(2)
TORONTO	672,407	1,875,583,300	2,789	(3)	9.64	(3)
VANCOUVER	384,522	1,392,932,300	3,623	(2)	7.16	(4)
EDMONTON	281,027	511,595,100	1,820	(10)	2.62	(6)
HAMILTON	273,991	314,399,100	1,147	(12)	1.61	(8)
OTTAWA	268,206	282,982,800	1,092	(13)	1.45	(9)
WINNIPEG	265,429	3,028,876,400	11,411	(1)	15.57	(1)
CALGARY	249,641	553,953,300	2,218	(4)	2.84	(5)
QUEBEC	171,979	374,102,800	2,175	(6)	1.92	(7)
LONDON	169,569	212,305,100	1,252	(11)	1.09	(11)
WINDSOR	114,367	100,835,700	882	(14)	.51	(14)
REGINA	112,141	241,427,400	2,153	(7)	1.24	(10)
SASKATOON	95,526	210,381,800	2,202	(5)	1.08	(12)
HALIFAX	92,511	170,666,900	1,844	(9)	.87	(13)
ST. CATHERINES	84,472	36,311,200	429	(15)	.18	(15)

72. Adapted from the 1961 Canada Census

each city accomplishes and their per capita wholesale sales.

Windsor ranks fourteenth out of the fifteen cities, these cities accounting for fifty-one percent of Canada's total wholesale sales in 1961, and it also ranks fourteenth in per capita wholesale sales.

Four areas of study will be used to analyze Windsor's ranking in wholesaling: smaller and larger cities; strong versus weak central places; distance from competing centers and functional types.

Ten of the cities which had a wholesaling ranking higher than Windsor were larger in population and thus should be expected to have more wholesale sales.<sup>73</sup> Three of the cities, however, which rank above Windsor have smaller populations -- Regina, Saskatoon and Halifax. All three of these cities are more important central places than Windsor. Regina and Saskatoon are among the largest cities in the prairies. They have no nearby competing centers<sup>74</sup> and both exhibit a number of key central place activities (wholesale trade; retail trade; finance; transportation; service and public utilities<sup>75</sup>). Halifax, like Regina is a provincial capital. In addition it is a regional and seaport center. Halifax's location places it at an advantage in being a central place since it has no competing centers for hundreds of miles in any direction. According to Maxwell, its dominant function is government services and its distinctive functions include transportation; wholesale trade; finance and public utilities.<sup>76</sup>

Maxwell states that Windsor has both a dominant and distinctive

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73. Beckman states "the size of the population determines the number of potential ultimate customers", p. 213.

74. The closest city of any significant size to either of these cities other than themselves is Moose Jaw whose population is well less than half of either Regina or Saskatoon.

75. Maxwell, pp. 97-98.

76. Ibid., p. 102.

function of manufacturing. Much of Windsor's growth therefore has occurred because of the increase in manufacturing. Although manufacturing expansion stimulates the growth of wholesaling and other service functions, this factor is offset by the large numbers in manufacturing families who when joined with other population and used as a divisor, produces a low per capita rating in wholesale sales in Windsor. A "dilution effect" upon wholesaling rank is brought about whenever one or several other functions dominate the employment in a city. Also, if manufacturers are performing some unreported wholesale activities, this will dilute per capita wholesale sales.<sup>77</sup> Thus, the low per capita wholesale sales average in Windsor or similar trade centers could have been anticipated.

However, it should be noted that a city's location in the heartland does not imply that it is a manufacturing center. London, for example, has a dominant function of manufacturing but it is also the principal service center in Southwestern Ontario and it is an important financial and insurance center on the national level.<sup>78</sup>

As a manufacturing center, Windsor is more specialized than any other area of comparable size in Canada. The consumers of the region, however, require approximately the same assortment of goods as their facsimiles in other regions. Manufacturing also requires a multitude of goods for their operation -- raw materials, equipment, etc., only a part of which they may purchase directly, obtaining the remainder from middlemen.

It is ironic then that manufacturing is the basis for Windsor's economy, giving the city a higher than average per capita income yet low total retail and wholesale sales. This serves to further strengthen the point

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77. Per capita wholesale sales are used as a measure of comparison rather than absolute sales as the latter does not reflect city size. Per capita sales reflects not only total sales but also the population.

78. Maxwell, p. 92.

that Windsor loses retail and wholesale sales through leakage to larger metropolitan areas.

Since the total consumers of the Windsor area require a much wider range of goods than they themselves produce, they must then import a great deal from other regions. The city's wholesalers perform as agents in purchasing goods for re-sale to retailers, institutions, manufacturers and other wholesalers. They perform an important function, however, their reach is quite limited compared to the total sphere of London. According to the London Chamber of Commerce,<sup>79</sup> London's retail and wholesale hinterland includes all Southwestern Ontario to Waterloo County. It was stated that London's trade area was strongest in Middlesex, Huron, Perth, Oxford and Elgin Counties. These five counties have a combined population of 549,800.<sup>80</sup> Windsor's trade area on the other hand, is primarily concentrated in Essex County, having a population of 309,600.<sup>81</sup>

These statistics become very pertinent when wholesale figures are studied for these two cities. In 1951, the population of Windsor was 120,049<sup>82</sup> of whom approximately 1,788 were employed in 183 wholesale locations. The total wholesale sales of these locations was \$115,897,200; \$965.00 per capita or \$633,318 per location.

The population of London in 1951 was 95,383. Wholesale employed 2,497 persons in 193 locations. The total wholesale sales of these locations was \$133,022,200; \$1,394.00 per capita or \$666,223 per establishment. Thus,

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79. From an interview with the Secretary of the London Chamber of Commerce, August, 1973.

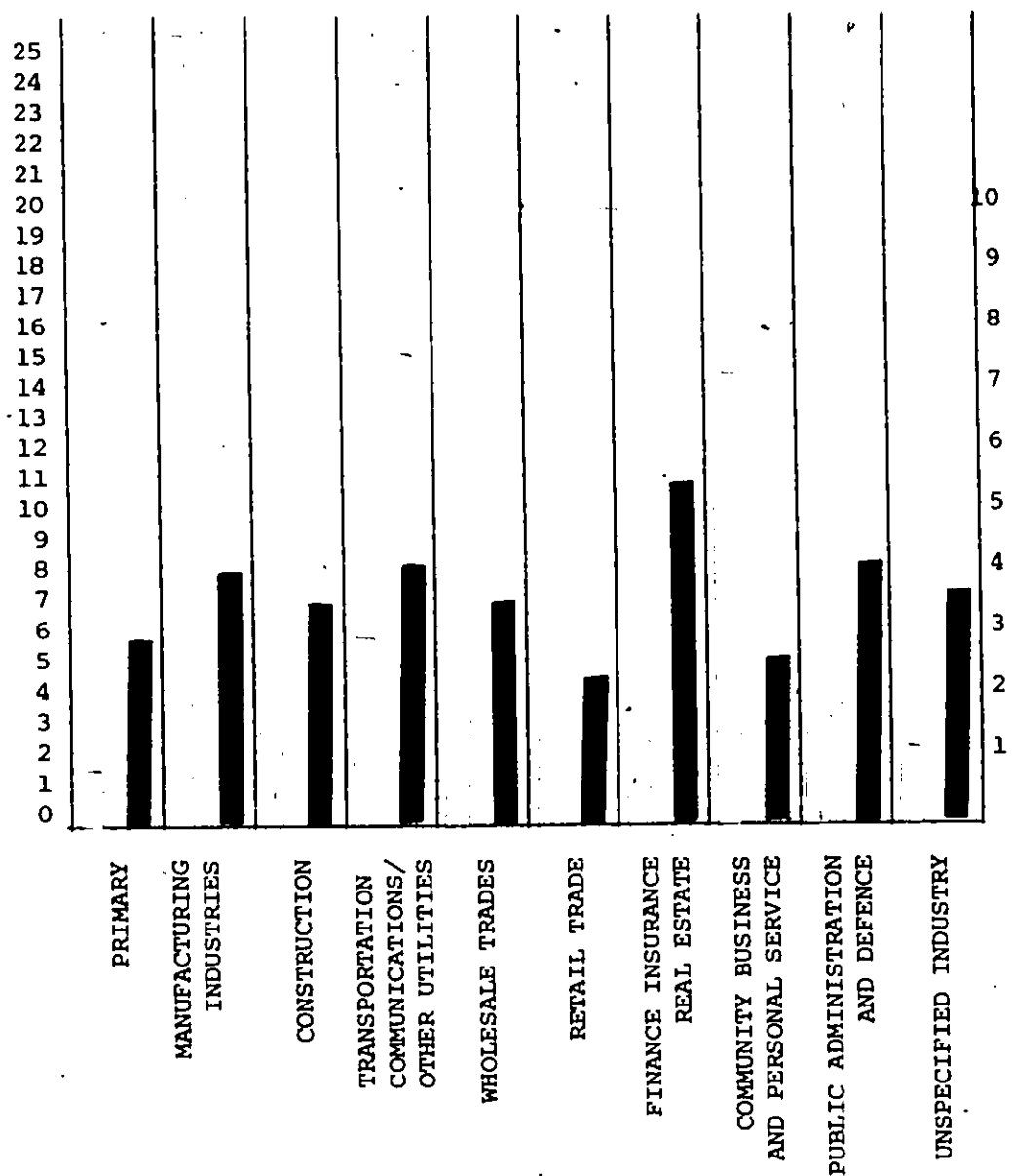
80. The Financial Post, Survey of Markets, 1972. MacLean-Hunter Ltd., Toronto., 1972, p. 51.

81. Ibid.

82. The population statistics for both Windsor and London are for the city not the metropolitan area. It should be remembered however, that sales did take place outside city limits in both cases.

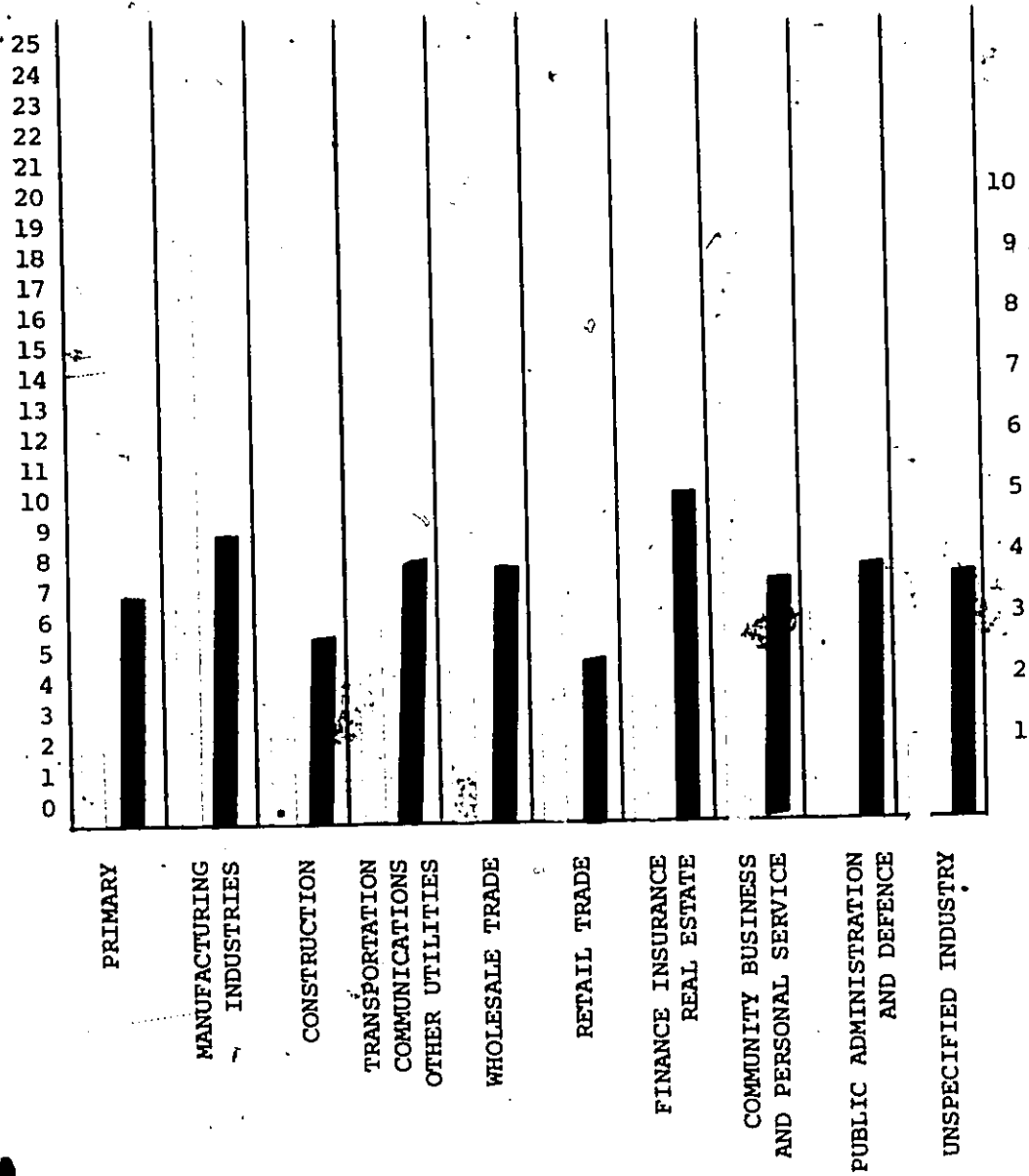
Table 4<sup>83</sup>

WAGE EARNERS AND AVERAGE EARNINGS BY  
OCCUPATION FOR WINDSOR, 1961



83. Taken from the 1961 Census of Canada, Vol. 3, Part 3, p. 32-19.

Table 5 84

WAGE EARNERS AND AVERAGE EARNINGS BY OCCUPATION FOR LONDON, 1961



London, in 1951, with its larger hinterland had not only more wholesale locations by 5.4% and more wholesale sales by 14.7%, but also greater sales per capita and per establishment.

In 1961, the population of Windsor fell to 114,367 with the wholesale function employing 1,859 persons in 202 locations. This was 3.64% of Windsor's total work force and ranked wholesale trade as Windsor's eighth largest employer out of ten, (Figure 4), with only primary industry and unspecified industry employing fewer persons. Those employed in wholesaling were on the average the sixth best paid, out of ten, (Figure 5), with primary industry; construction; retail trade and community business and personal service being the poorest.

Wholesale sales in Windsor, in 1961, amounted to \$100,835,700 or approximately \$882 per capita or \$499,137 per location.

The population of London in 1961 rose to 169,569 with the wholesale function employing 3,423 persons in 264 locations. This was 5.61% of the city's total work force and wholesale trade ranked as London's sixth largest employer out of ten (Figure 5). Those employed in the wholesale function were on the average the fifth best paid (Figure 5).

Wholesale sales in London amounted to \$212,305,000 or approximately \$1,252 per capita or \$804,187 per location in 1961.

Analyzing these figures reveals that between 1951 and 1961 the population of London rose 77.7%<sup>85</sup> while the number of persons employed in wholesaling rose 37% for the same years. The number of wholesale locations increased by 37.6% and wholesale sales by 59.6%.

Windsor's wholesaling growth for the same time period is not impressive

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85. London, in 1961 experienced an annexation which increased the size of the population from 102,743 in 1960 to 162,184 in 1961 and the area of the city from 7,915 acres in 1960 to 42,550 acres in 1961.

Table 6 86

TOTAL NUMBER OF WHOLESALE ESTABLISHMENTS FOR WINDSOR AND LONDON  
BETWEEN 1951 AND 1961

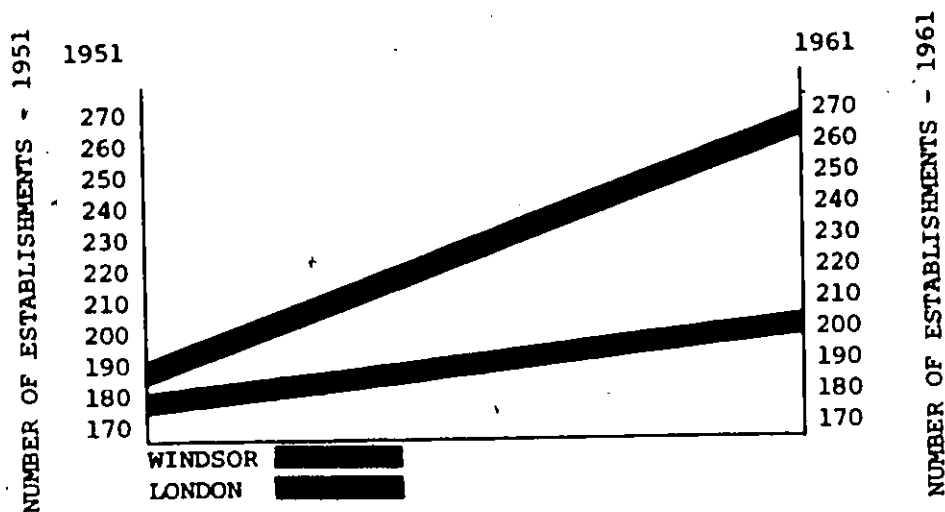
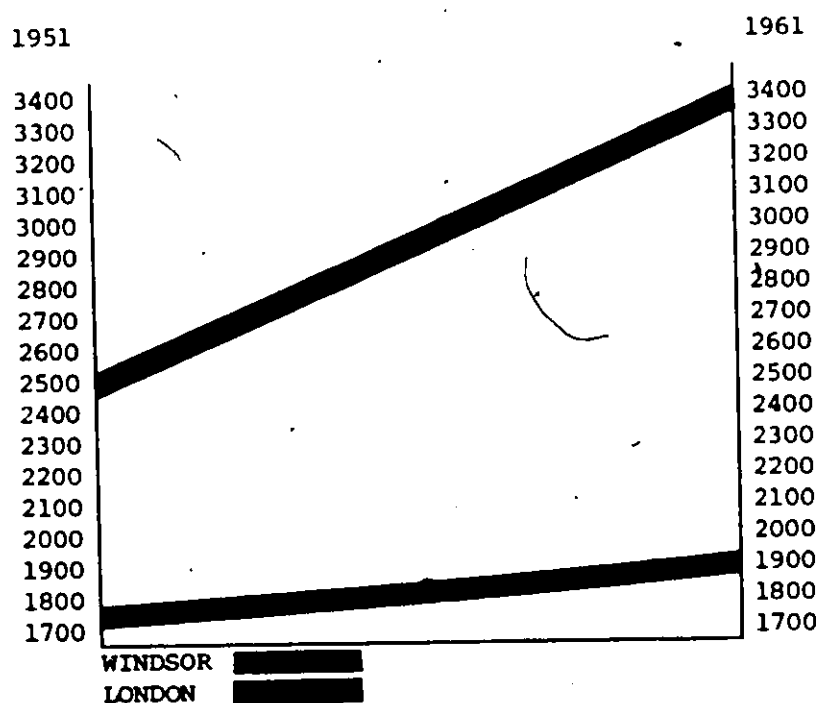


Table 7 87

TOTAL NUMBER OF PERSONS EMPLOYED IN WHOLESALING FOR WINDSOR AND  
LONDON BETWEEN 1951 AND 1961



86. Adapted from the Census of Canada 1951 - 1961

87. Adapted from the Census of Canada 1951 - 1961

with the population of the city declining 4.9%.<sup>88</sup> The number employed in wholesaling rose 3.7% while the number of wholesale locations rose 10.3%.

Windsor is well below London and the Ontario mean for these three figures for the years 1951 to 1961. In the province, employment in wholesale sales rose approximately 35%, number of wholesale locations rose 33.5%, and the amount of total wholesale sales increased by 39.2%.<sup>89</sup>

By means of this comparison, several trends are observed. Total wholesale sales in Ontario and London increased quite significantly in a manner which corresponds to their population increase.<sup>90</sup> Windsor's wholesale sales by comparison declined in a manner which corresponded to the city's population decline. Employment in wholesale trade and the number of wholesale locations also increased significantly from 1951 to 1961 in London and Ontario, while Windsor's wholesale employment changed insignificantly by comparison, increases being well under the provincial mean (Figures 8 and 9). In addition, Windsor is under the provincial mean of wholesale sales per capita and per location.

Table 8 <sup>91</sup>

WHOLESALE SALES PER CAPITA AND PER LOCATION - 1961

	<u>Per Capita</u>	<u>Per Location</u>
London	\$1252	\$804,187
Ontario	\$ 933	\$701,878
Windsor	\$ 882	\$499,133

88. Windsor in 1965 experienced an annexation which increased the population of the city from 115,285 in 1964 to 186,903 in 1965 and the area of the city from 15 sq. miles in 1964 to 49 sq. miles in 1965.

89. With the recent annexations in Windsor, the unreleased 1971 wholesale figures for Windsor probably will show a fair rise in sales and establishments, but the much larger population input will further drive down the per capita wholesale sales.

90. This corresponds to Beckman's statement "A point of major importance is the population of the community." p. 313.

91. Adapted from the Census of Canada, 1951 - 1961.

Also, Windsor as illustrated in Figure 9 is not keeping pace with the provincial means in the number of people employed in wholesale trade, or in total wholesale sales.

92

Table 9

	<u>% Change of Persons Employed in Wholesale Trade, 1951 - 1961</u>	<u>% Change of Total Wholesale Sales 1951 - 1961</u>
London	+ 37.0	+ 59.6
Ontario	+ 35.3	+ 39.2
Windsor	+ 3.7	- 14.9

Clearly, wholesale trade is relatively of low significance to the economic well being of Windsor. However, to state that wholesale trade is not essential would be a gross oversimplification. The wholesale function, is necessary in every large urban area. Although larger chain stores and manufacturers are assuming increasing importance in the wholesale function, there will always be a need for a middleman to service the independent retailer, manufacturer or institution.

As can be seen using Windsor and London as examples, the extent of the wholesale function varies considerably from city to city. What makes wholesale trade more significant in London than in Windsor? The answer is quite simple - superior location. London's location places it in a large unbounded hinterland having excellent accessibility in all directions and a lack of cities nearby which compete for London's wholesale and retail market. Even though London is only 120 miles from Toronto, it did not develop in Toronto's shadow as Windsor did in Detroit's. Because of this and the size of its hinterland, London's wholesale sector is more diversified

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92. Adapted from the census of Canada, 1951 - 1961.

than Windsor's and the units themselves are larger. The actual site and situation of the city are the most important determining factors for growth of a wholesale city. They determine the circumstances in which the city develops, the size of its hinterland, and the effects of competing centers.

## CHAPTER V

THE LOCATIONAL PATTERN OF WHOLESALERS IN WINDSOR

The preceding chapters have defined wholesaling, given an outline of the development of wholesaling in Windsor, discussed Windsor's importance as a wholesale center and analyzed the significance of wholesaling in Windsor in comparison with other centers. It is the purpose of this chapter to review the literature on the intra-city location of wholesalers, to describe their locations in Windsor, and to analyze in particular the motives of the grocery and confectionary wholesalers for locating where they have.

GENERAL LOCATION FACTORS OF WHOLESALING

Studies relating to the selection of a middleman's location have received little attention in Canada. Neither Maxwell's work nor The Service Industries analyzes the site selection of the individual distributor. References in Canadian published literature which refer to the location of wholesalers in cities are primarily found in city plans. Certain generalizations can be ascertained from these plans:

Wholesaling depends primarily on access to a major road network ... a concentration exists within the fringe area of the downtown. Commonly referred to as the transitional use area due to the encroachment of commercial uses into former residential areas, declining land values have made it economically feasible to operate space-consuming wholesaling and warehousing uses. 93

However, often city plans are vague in specific areas such as wholesale trade and the only reference which can be found are in city by-laws stating in which zones distributors can be located.

Beckman and Engle expound upon the importance of selecting a wholesaling

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93. Official City Plan of Windsor, 1970, p. 27.

location: Beckman states,

The proper location is of vital importance for the wrong choice may spell failure of the business. 94

He continues that every city, depending upon size, has one or more sections in which wholesale houses cluster. There are both advantages and disadvantages of locating in a wholesale cluster.

When merchandise is of a perishable nature and subject to price variations, the desire of retailers to visit the market and make purchases quickly makes a central location imperative. Also "limited service" wholesalers such as cash and carry wholesale groceries must locate centrally to be convenient to customers.

Small operations find a central location in a wholesale cluster beneficial since it allows inter-trade among them. They are also less apt to be overlooked if they cluster and are generally closer to transportation facilities and other facilitative services,<sup>95</sup> i.e., banks.

Beckman states there are also numerous incentives for wholesale firms to locate outside the wholesale district, the most important of which is more space to construct horizontal warehouses. It allows for the procurement of less expensive land with room for expansion if necessary. If the location is outside an incorporated area, tax saving can be important. Other benefits of non-wholesale districts are relief from the older, narrower streets and congestion which hinder trucking and delivery operations, and the availability of larger blocks which allow setbacks for landscaping and off-street parking. If most of the firms sales are made by salesmen and are delivered, then the wholesaler can choose almost any location without concern for the locational conveniences for customers.

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94. Beckman, p. 307.

95. Ibid., p. 323.

For the location of a specific site several factors must be considered as noted by Beckman:<sup>96</sup>

1. The firm's rent-paying ability must be considered.
2. Proximity to truck terminals is important for handling less than car lot shipments. For bulky goods a location close to waterfront or rail facilities is advantageous.
3. Accessibility to customers and factors such as access to throughfares, parking facilities, and proximity to customers must be considered, especially if customers pick up orders.
4. Proximity to local sources of supply is advisable, if local sources are significant since it simplifies the assembly function.
5. Finally, the possibility of expansion must always be considered when selecting a site.

Revzan lists additional factors for the selection of a specific site:<sup>97</sup>

1. The volume of warehouse space by type.
2. The numbers, types and locations of potential customers.
3. Rental and related costs, or equivalent construction cost.
4. The effects of integration.
5. The relative merits of clustering with other wholesale middlemen versus isolated locations.
6. The location of inbound and outbound transportation facilities.
7. Specific zoning restrictions.
8. The locational proximity of pertinent facilitating agencies.
9. The locational proximity where applicable, to the necessary labour force. This is a weak factor because of the low labour

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96. Ibid., pp. 325-327.

97. Revzan, pp. 237-239.



input in wholesaling.

It should be noted that some of these factors conflict and it might therefore, be necessary to utilize a cost-benefit analysis to make the best location decision.

Revzan considers clustering to be an important locational factor because "The combined attractive and competitive strength of the clusters may well exceed the locational strength of having only one establishment". In addition, clusters can sharpen competition; attract more patronage proportionately than a single establishment; enable a systematic basis for conducting marketing transactions and furnish a base for integration and for complementarity of economic relationships.

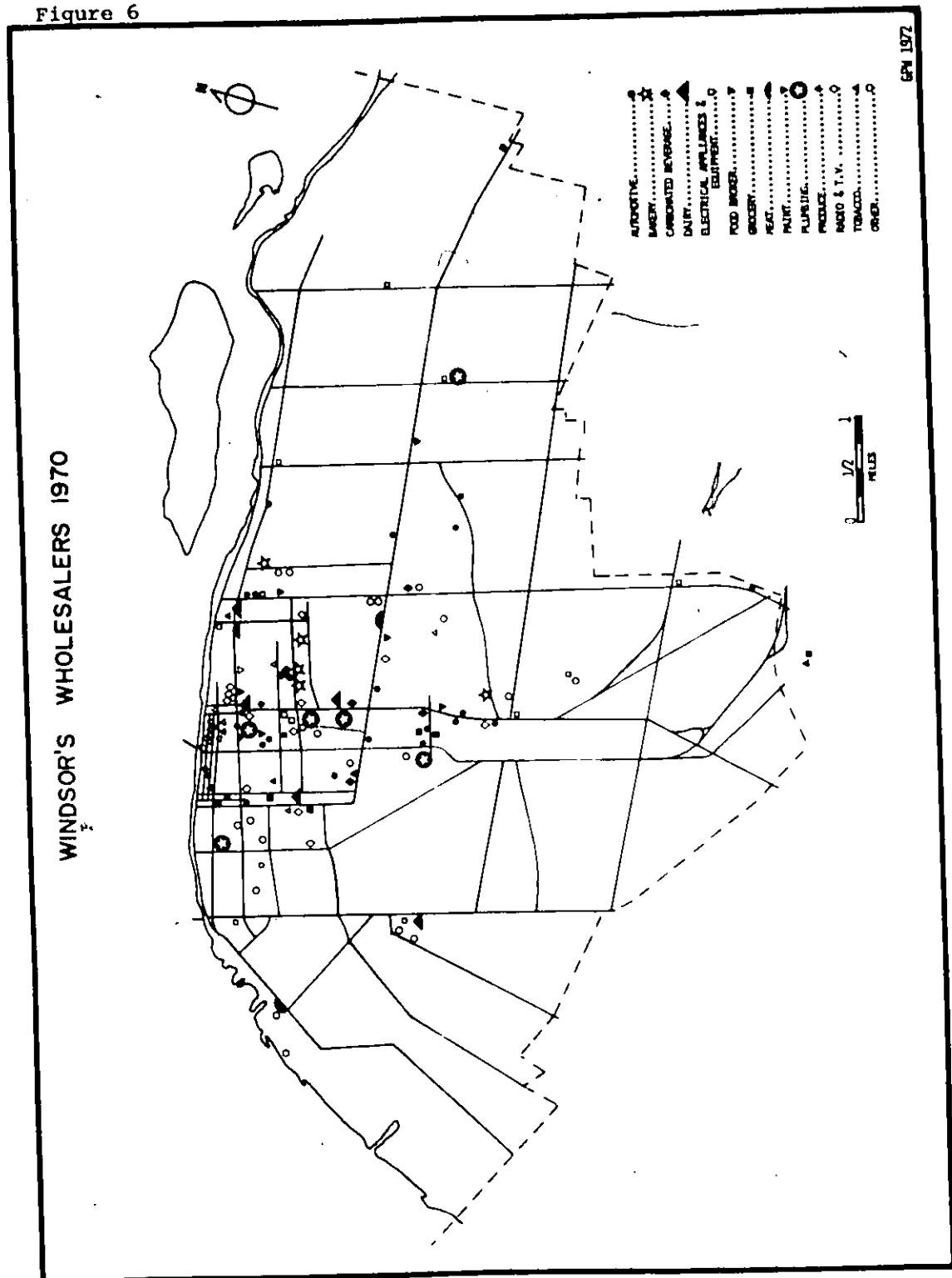
The various criteria discussed in this segment will be examined in the following section as they apply to wholesale location patterns in Windsor.

#### THE LOCATION OF WHOLESALERS IN WINDSOR

In general, the sites of most of Windsor's wholesale distributors relate in some way to the criteria established by Beckman and Engle and Revzan. Few of them however conducted a comprehensive locational study. Most distributors had an idea of where they wished to locate and were thus limited by what was available and by costs. The determining factor as to how comprehensive a study was to be conducted was the amount of money the distributor planned to invest in his site, i.e., if a considerable sum was to be invested then a more comprehensive study was completed.

In Windsor the degree of concentration of wholesaling establishments varies considerably among product groups (Map 6). As this map illustrates, there is only one cluster in the city -- that of produce wholesalers around

Figure 6



the city market. The remainder of the distributors are dispersed throughout the city servicing a market of scattered small establishments.

In an effort to analyze the locations of Windsor's wholesalers, a microstudy was done using grocery and confectionery suppliers.

These distributors represent one of Windsor's largest wholesale commodity groups. They include both the largest cluster of wholesalers (produce) as well as a considerable number of dispersed distributors. The selection of this group affords an opportunity to evaluate different locational factors. Selected examples from other commodity lines will be used to illustrate other locational choice situations.

The wholesale grocery and confectionery suppliers have undergone tremendous change in the past several decades. Locally grown fresh fruits and vegetables are providing an ever-decreasing portion of the total business. Food retailing is being revolutionized from a system dominated by the small corner store to one dominated by large supermarkets. These supermarkets are to a large extent, part of the large corporate chains using centralized procurement, merchandizing and warehousing policies.

Categorized as retailers, chains have assumed some of the marketing functions once belonging to wholesalers, and some manufacturing functions as well. This situation has led to what is now being termed "The vertical integration" of the wholesale function. These organizations, because they are large enough, buy direct from shipping points rather than from local produce wholesalers while others even own farms where they grow their own products.<sup>98</sup> Another important factor in the trend towards vertical integration is that many food

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98. J. C. Ransome, lecture notes, November 29, 1968.

manufacturers now act as distributors themselves to derive greater profits and efficiency, and to obtain better market data. This has resulted in substantial reduction in the number of grocery and confectionary wholesalers in cities. Figure 10 illustrates this for Windsor.

A further comparison of Windsor's distributors from 1941 to 1961, (Figure 11), reveals evidence of more trends. For the purpose of this comparison, the distributors will be placed in three categories. The first includes those that existed in 1941, the second those that existed in 1951, and the third those of 1961.<sup>99</sup>

Several trends can be ascertained from an investigation of the distributors established prior to 1941. There was a decline in the number of automotive, chemical, coal and coke, food products, groceries and food specialties, waste material, manufacturers' sales establishments and agents and brokers. Of these only coal and coke distributors, waste material, and manufacturers' sales branches declined in sales and employees; agents and brokers declined in employees but increased in sales, while most others showed gains in both sales and number of employees.

The general trend at this time appears to be slight declines in the number of wholesale establishments and increases in total sales and number of employees. Wholesalers, like retailers, are operating larger establishments compared to those of twenty years ago.

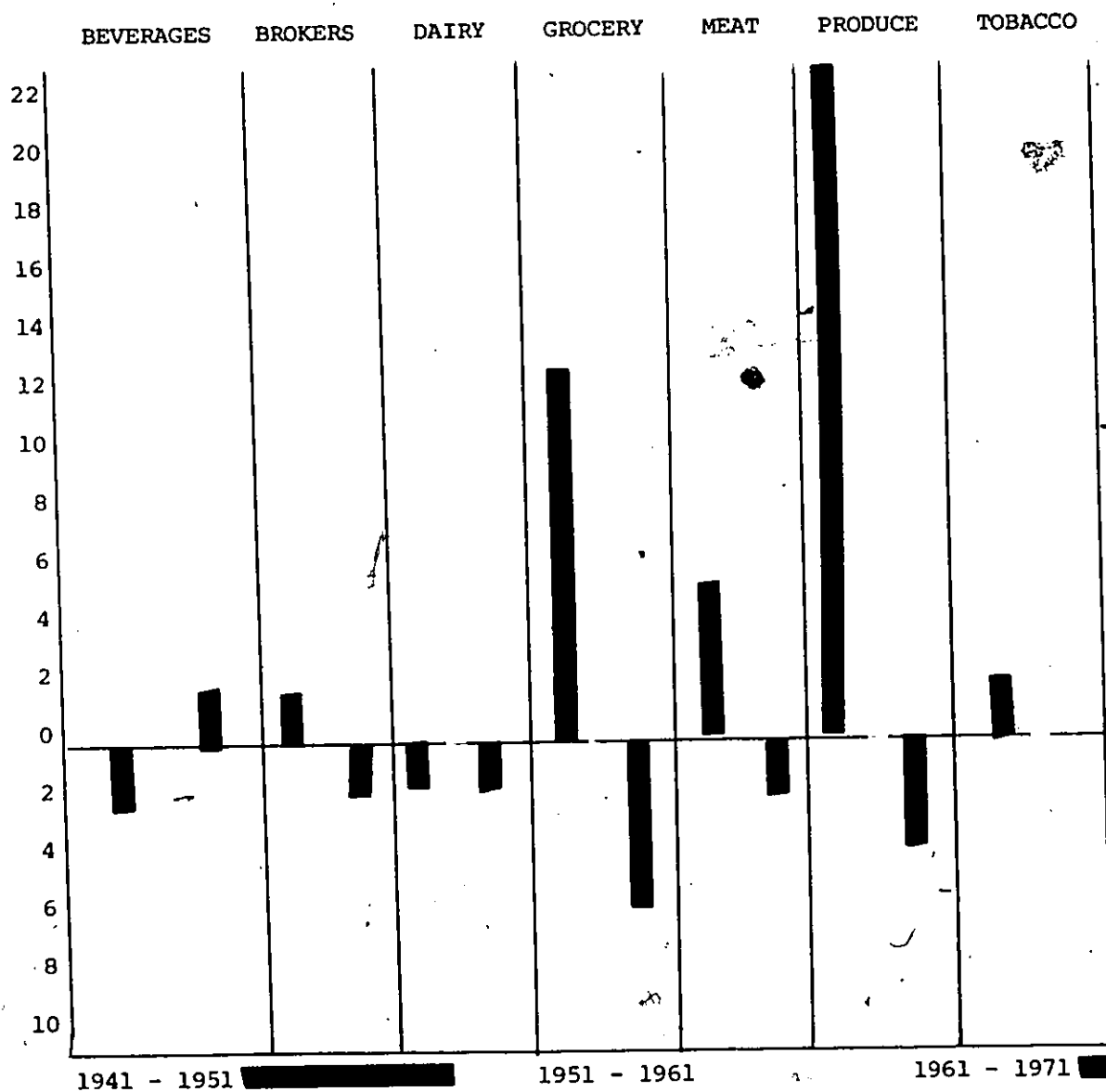
Food products showed the greatest increase in sales of the distributors established prior to 1941, while groceries and food specialties ranked fourth in this same group. This is despite the fact that food products increased only 23% in numbers and grocery specialties actually declined 13%. Both of these increases in sales, 918% for food products and 247% for groceries and

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99. It should be noted that figures are not available for every distributor for each of the years in the study.

Table 10<sup>100</sup>CHANGE IN THE NUMBER OF WINDSOR'S WHOLESALE, GROCERY, ANDCONFECTIONARY SUPPLIERSFOR THE YEARS 1941 - 1951; 1951 - 1961 - 1961 - 1971

(ABSOLUTE FIGURES)



100. Adapted from the Windsor Telephone Directory "Yellow Pages". 1941, 1951  
1961, 1971.

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Table 11

A COMPARISON OF WINDSOR'S WHOLESALERS, 1941, 1951, 1961

<u>COMMODITY</u>	<u>YEAR</u>	<u>NUMBER</u> <u>OF EST.</u>	<u>% CHANGE</u>	<u>WHOLESALE</u> <u>SALES (\$M)</u>	<u>% CHANGE</u>	<u>NUMBER</u> <u>OF EMP.</u>	<u>% CHANGE</u>
<u>AMUSEMENT</u>	1941	-		-		-	
	1951	1		-		-	
	1961	3	+ 200	752		11	
Total % Change 1951 - 1961			+ 200				
<u>AUTOMOTIVE</u>	1941	18		2,623		121	
	1951	17	- 6	13,807	+ 396	216	+ 79
	1961	16	- 6	3,527	- 78	138	- 36
Total % Change 1941 - 1961			- 11		+ 34		+ 14
<u>CHEMICAL</u>	1941	9		1,130		33	
	1951	2	- 78	-		-	
	1961	6	+ 200	4,006		123	
Total % Change 1941 - 1961			- 33		+ 254		+ 272
<u>COAL AND COKE</u>	1941	6		3,247		69	
	1951	3	- 50	3,132	- 4	50	- 28
	1961	4	+ 33	3,100	- 1	48	- 40
Total % Change 1941 - 1961			- 33		- 5		- 30
<u>ELECTRICAL</u>	1941	-		-		-	
	1951	5		2,437		50	
	1961	5	0	970	- 60	17	- 66
Total % Change 1951 - 1961			0		- 60		- 66
<u>FOOD PRODUCTS</u>	1941	26		1,972		51	
	1951	22	- 15	9,749	+ 394	178	+ 249
	1961	24	+ 9	20,074	+ 106	262	+ 47
Total % Change 1941 - 1961			- 8		+ 918		+ 414
<u>FURNITURE</u>	1941	-		-		-	
	1951	3		151		6	
	1961	4	+ 33	945	+ 526	26	+ 333
Total % Change 1951 - 1961			+ 33		+ 526		+ 333
<u>GROCERIES AND</u> <u>FOOD SPECIALTIES</u>	1941	8		3,133		83	
	1951	5	- 37	7,112	+ 127	145	+ 39
	1961	7	+ 40	10,864	+ 53	113	- 2
Total % Change 1941 - 1961			+ 23		+ 247		+ 36

## A COMPARISON OF WINDSOR'S WHOLESALERS, 1941, 1951, 1961 - Cont'd.

COMMODITY	YEAR	NUMBER OF EST.	% CHANGE	WHOLESALE SALES (\$M)	% CHANGE	NUMBER OF EMP	% CHANGE
<u>HARDWARE</u>	1941	4		2,020		108	
	1951	3	- 25	2,558	+ 27	102	+ 6
	1961	8	+ 166	6,395	+ 150	204	+ 100
Total % Change 1941 - 1961			+ 100		+ 217		+ 89
<u>LUMBERING AND BUILDING</u>	1941	-		-		-	
	1951	2		-		-	
	1961	14	+ 600	4,734		156	
Total % Change 1951 - 1961			+ 600				
<u>MACHINERY</u>	1941	15		8,054		66	
	1951	32	+ 113	7,423	- 8	155	+ 135
	1961	41	+ 28	8,040	+ 8	225	+ 45
Total % Change 1941 - 1961			+ 173		- .17		+ 241
<u>PAPER AND PAPER PRODUCTS</u>	1941	-		-		-	
	1951	1		1,434		50	
	1961	4	+ 300	1,860	+ 30	69	+ 38
Total % Change 1951 - 1961			+ 300		+ 30		+ 38
<u>PETROLEUM BULK TANK STATIONS</u>	1941	7		-		-	
	1951	7		9,751		103	
	1961	8	+ 14	13,279	+ 36	66	- 36
Total % Change 1951 - 1961			+ 14		+ 36		- 36
<u>PLUMBING, HEATING, REFRIGERATION EQUIP.</u>	1941	-		-		-	
	1951	2		-		-	
	1961	6	+ 200	1,569		37	
Total % Change 1951 - 1961			+ 200				
<u>WASTE MATERIAL</u>	1941	8		1,833		95	
	1951	4	- 50	4,986	+ 172	53	- 44
	1961	7	+ 75	1,804	- 64	62	+ 17
Total % Change 1941 - 1961			- 13		- 2		- 35
<u>AGENTS &amp; BROKERS</u>	1941	8		1,919		8	
	1951	-		-		-	
	1961	5	- 29	2,355	+ 23	7	- 13
Total % Change 1941 - 1961			- 29		+ 23		- 13
<u>MANUFACTURERS' SALES BRANCHES</u>	1941	19		12,680		272	
	1951	42	+ 121	40,851	+ 222	178	- 35
	1961	10	- 77	7,240	- 82	108	- 39
Total % Change 1941 - 1961			- 47		- 42		- 60

food specialties, occurred despite a population increase on the part of the city of only 8.6%. This would be the result of several things: the movement of people to the suburbs, where they are not included in the city census but they still buy their goods from stores supplied by these wholesalers. The rate of inflation between 1941 and 1961 would also account to a certain extent for the great increase in sales by these distributors. As Figure 12 illustrates, the consumer price index rose from 69.6 in 1941 to 129.2 in 1961. A lesser factor would be that people, being more prosperous were spending more on food; buying more of it and also buying a more diversified range of food in 1961.

Table 12 102

CONSUMER PRICE INDEX NUMBERS, 1941 - 1961

(1949 = 100)

Year	Index	Year	Index	Year	Index	Year	Index
1941	69.6	1946	77.5	1951	113.7	1956	118.1
1942	72.9	1947	84.8	1952	116.5	1957	121.9
1943	74.2	1948	97.0	1953	115.5	1958	125.1
1944	74.6	1949	100.0	1954	116.2	1959	126.5
1945	75.0	1950	102.9	1955	116.4	1960	128.0
						1961	129.2

Because of these fluctuations in certain sectors of wholesaling the importance of location as emphasized by Beckman becomes more pertinent. As the market and competition from larger units develops, location becomes

102. Canada Year Book, 1963 - 1964. Queen's Printer, Ottawa, 1964., p. 899.



a more important factor and a convenient location becomes more determinative. In a smaller community location is not an important consideration due to a lack of competition and short distances. However, as the market grows and the competition both grows and sharpens, a good location offering accessibility room for expansion and reasonable rent could, as Beckman states, be the determining factor for success or failure.

#### AN ANALYSIS OF THE LOCATION OF GROCERY AND PRODUCE WHOLESALERS IN WINDSOR

In an effort to determine how the individual wholesaler views location, a questionnaire was submitted to all grocery and confectionary wholesalers in the city. Generalizations based upon the findings of these questionnaires are then established. Two methods of analyzing the data acquired were used: a factor analysis<sup>103</sup> was used in an effort to determine locational preferences, reasons for site selection and location trends among the distributors in question. Because of the large number, seventy-six variables, and the relatively small sample number, the multi-variable results were reduced into a more manageable number of factors (six) by means of a principal components analysis<sup>104</sup> which account for 60% of the total variance of the variables. Secondly, the empirical data collected by the questionnaire

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103. Because of the great number of variables and the few number of cases a factor analysis could result in an unstable coefficient due to the degree of freedom. For this reason, the factor analysis was used primarily to ascertain general patterns.

104. Adapted from James McConnell, "The Middle East: Competitive or Complementary" in Tijdschrift Voor Econ En Soc Geografie. March/April, 1967, p. 85. Principal components analysis is explained by McConnell in terms of geometry. For example, imagine that the 76 original variables are points in M-dimensional space. Those variables that are related are highly and positively correlated, should be near to each other and located at a distance from those variables that are not related or correlated. Principle components then attempts to locate these various points in space by inserting suitable axis into the space, one axis for each dimension of the M-dimensions. Then any points location is its multiple identification obtained by reading its coordinates on the M-axis. The purpose of the analysis, then is to insert the axis through the many groups of points in such a manner as to locate this axis so that they account for as much as to the total variance of the variables as possible. It is possible in this way to reduce the original 76 variables to six factors that together account for 60% of the total variance of the variables.

were analyzed by type of grocery or confectionary wholesaler.<sup>105</sup>

Table 13

RESULTS OF THE PRINCIPAL COMPONENTS ANALYSIS

<u>FACTOR</u>	<u>EIGENVALUE</u>	<u>PERCENT OF TOTAL VARIANCE ACCOUNTED FOR</u>	<u>ACCUMULATED PERCENTAGE</u>
I	26.36	34.89	34.89
II	5.39	6.89	41.78
III	4.23	5.57	47.35
IV	3.44	4.54	51.89
V	3.21	8.76	56.11
VI	2.92	3.85	59.96

The first principal component accounting for approximately 35% of the total variance, is interpreted as being a "general characteristic" dimension. This is justified by an analysis of the factor loadings which reveal high factor scores for over one half of the variables. The factor score breaks the variables down into groupings by type: type of customer most sales are made to; range of market; ownership; reasons for location; areas where relocation is planned; reasons for relocation; type of vehicles used and miles driven.

This factor which deals with grocery, produce, meat, carbonated beverage distributors and brokers indicates that their sales are made primarily to retailers and other wholesalers. Their market is both regional and local. For most of these distributors their present location is their first and they located there principally because of inexpensive land, proximity

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105. The main heading grocery and confectionary wholesalers was subdivided into the sub-headings of carbonated beverages (non alcoholic); dairy; food brokers; grocery; meat; produce and tobacco based upon their specialization.

to other wholesalers, and the prestige of central office space. They located mostly in their house or brought existing facilities rather than constructing new facilities. A high percentage plan to relocate either closer to the market or in the suburbs. Two main reasons were given for the apparently contradictory suburban move. Either their old site was to be expropriated (two cases), or they required room for expansion. As far as sales are concerned, both deliveries and pick up sales received high scores with the main vehicles for delivery being stake trucks and cars with the average weekly mileage being approximately 400 for each type.

The second component which accounts for 6.89% of the total variance is identified as "location" dimension. This indicates that there is a tendency among grocery wholesalers and to a lesser extent dairy distributors to conduct a locational study and to locate on the basis of inexpensive land, good access to truck routes, suburban space allowing freedom of movement in all directions, and adequate truck and customer parking. The weighted locational factors which received a high score were

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in order: 1. good access to truck routes

2. inexpensive land

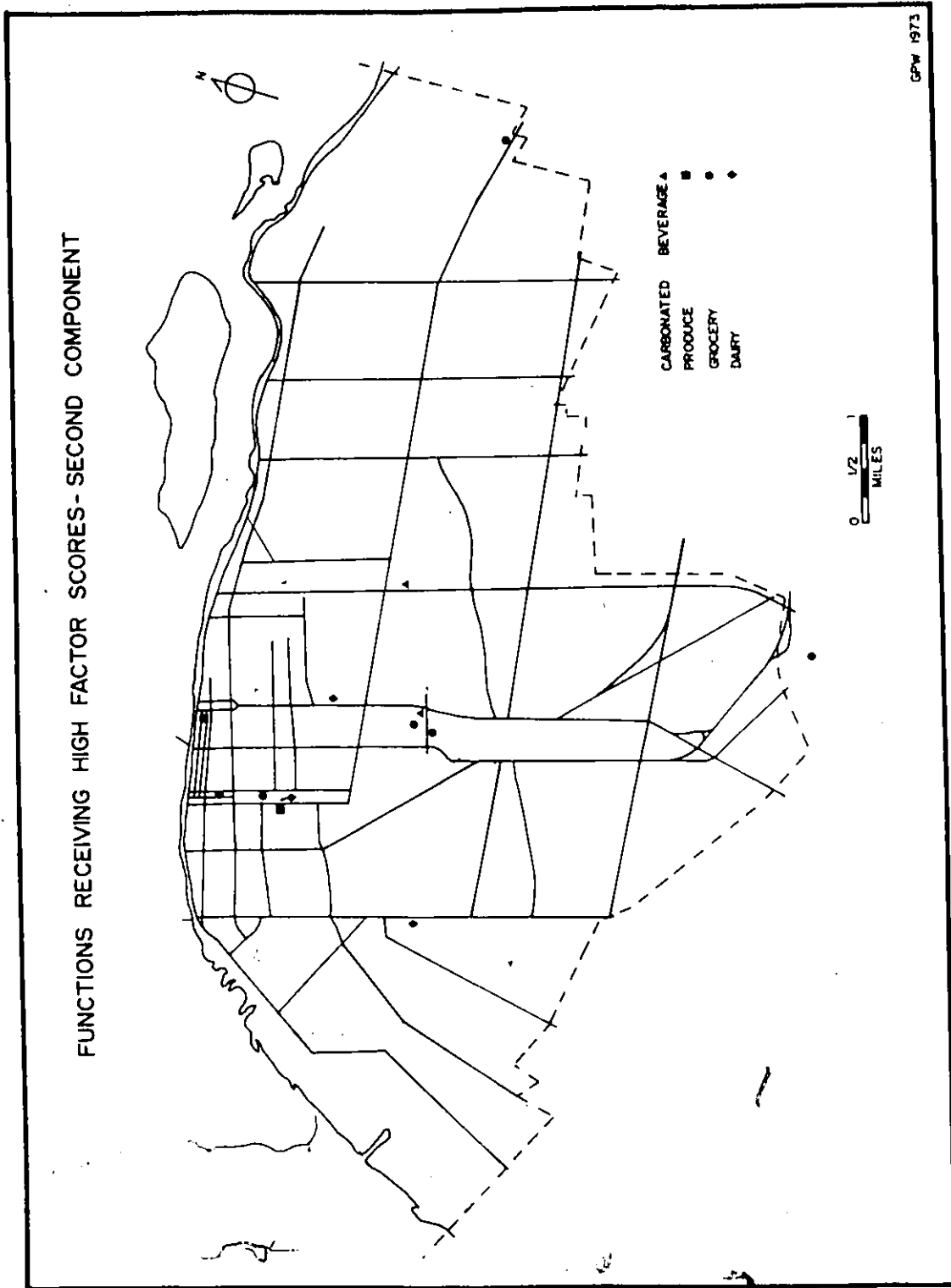
3. suburban space which allowed freedom of movement in all directions. Good access to truck routes was the overwhelming first choice receiving a factor score twice as high as inexpensive land and suburban space allowing freedom of movement in all directions which received almost equal scores. The major cause of relocation among these wholesalers is that their old location was too congested.

Map 7 locates the functions receiving high factor scores. The

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106. These factors are weighted on the questionnaire, question 21.

Figure 7



grocery distributors are all located along truck routes while three of them are located upon what was suburban land when they located there prior to the annexation of 1966. Dairies are also noted to be located along truck routes as are the carbonated beverage distributors. Both distributors require a high degree of accessibility because of the nature of their selling. Each not only services the city where the great majority of their sales are delivered but each also services Essex County and in several instances, Kent County as well.

The third component accounting for 5.57% of the variance primarily refers to whom sales were made and the type of trade area which these distributors service. The highest scores of the third component belong to produce and grocery wholesalers. The component states that this group has an international trade area, which for the purpose of this study is United States and Canada. As Map 8 illustrates, these wholesalers are either located close to the tunnel or bridge to Detroit or are located upon transportation routes which grant easy access to either international crossing point. They have been located at their existing sites between seven to forty years.

Only one of these wholesalers stated that one reason they selected their location was the proximity of the site to border crossings. All stated that they located where they did because of proximity to customers; good access to truck routes, and proximity of other wholesalers in that order of importance.

The fourth factor is concerned exclusively with grocery and produce wholesalers, Map 9. These distributors have a local market, with sales to local manufacturers showing a high score. Proximity to other wholesalers was voiced as being the major locational factor for this group. The

Figure 8

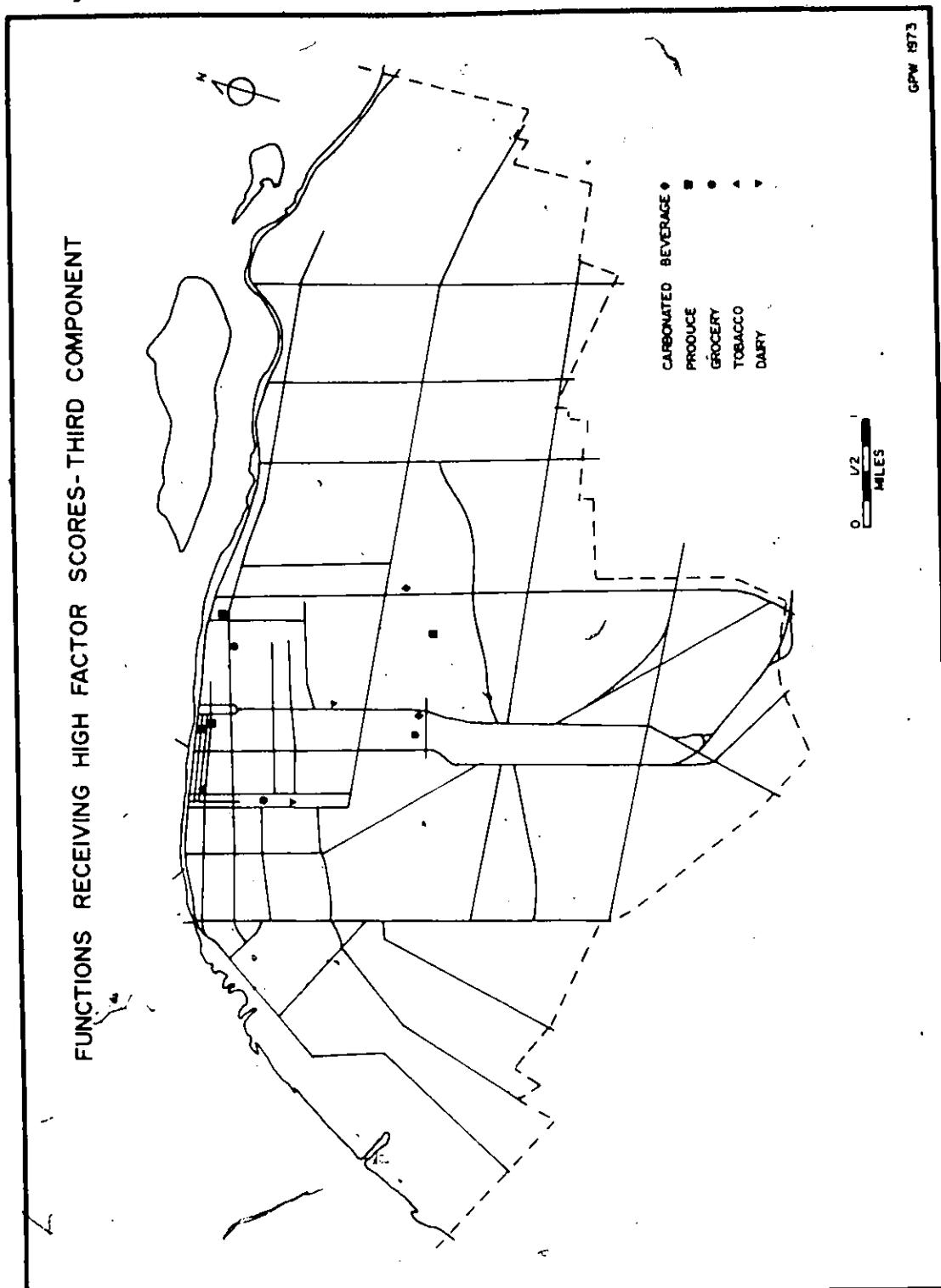
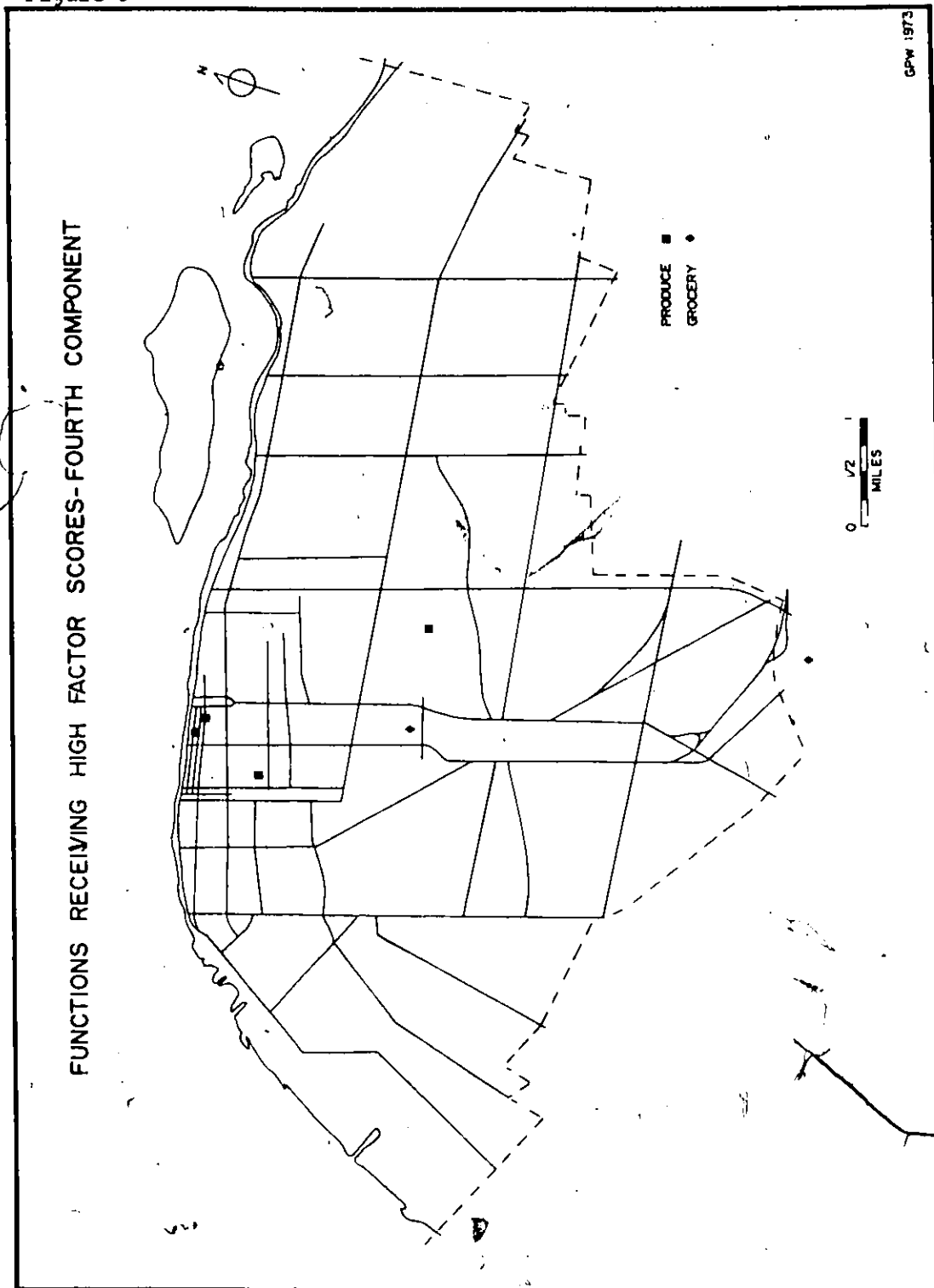


Figure 9



findings of this factor indicate that locations which are centrally located with good access to truck routes, and are located close to the other wholesalers, are considered basic by the respondents.

The grocery wholesalers of the fourth factor locate in areas having good access to transportation networks. Only one of these distributors has access to rail and he does not make any use of it although he stated that he may in the future. The produce outlets are located in the produce cluster surrounding the city market. One merchant is located in his residence. For this factor then, the characteristic of the location of grocery distributors is proximity to truck routes, while the major trait of the produce wholesalers seems to be a more centralized location.

The fifth principal component is, like the first, a general factor applying to four classifications - carbonated beverages; produce; grocery and tobacco. As Map 10 illustrates, all of these distributors are located in the region which is bounded by Crawford on the West, Lincoln on the East, Riverside Drive on the North and Tecumseh Road on the South. This represents one of the oldest areas of the city and one of the most intensively used.

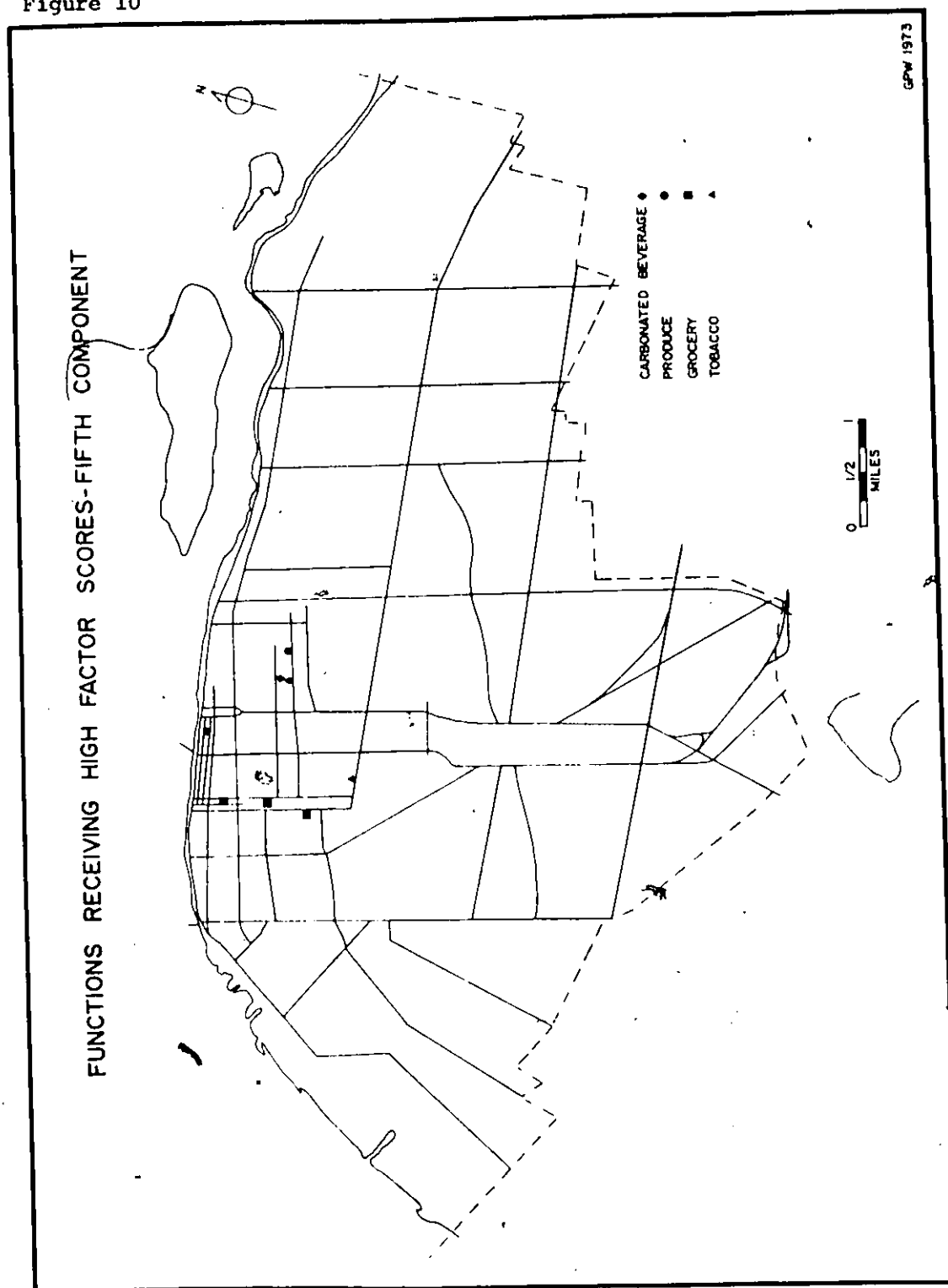
This component indicated low rent was given as the most important unweighted locational factor and that abundant parking was the most important weighted<sup>107</sup> factor for these distributors. An interesting possible trend occurring in this component is the location of grocery wholesalers, all of whom are located in an area adjacent to railway facilities, a fact not mentioned as a locational influence by any of these distributors. Two of these three wholesalers have private rail loading facilities, the third has

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107. These factors are weighted in the questionnaire, question number 21.



Figure 10



no access to the tracks. Both grocery distributors who have private railway spurs stated that they are seldom used since most shipping was done by truck. These two locations appear to be relics as they no longer take advantage of one of their initial causes of location - the railway.

The sixth component is a locational influence primarily of produce wholesalers, although grocery distributors also received high factor scores. The locational controls receiving the highest scores were proximity to customers and to other wholesalers. The weighted factor which received the highest score was proximity to customers.

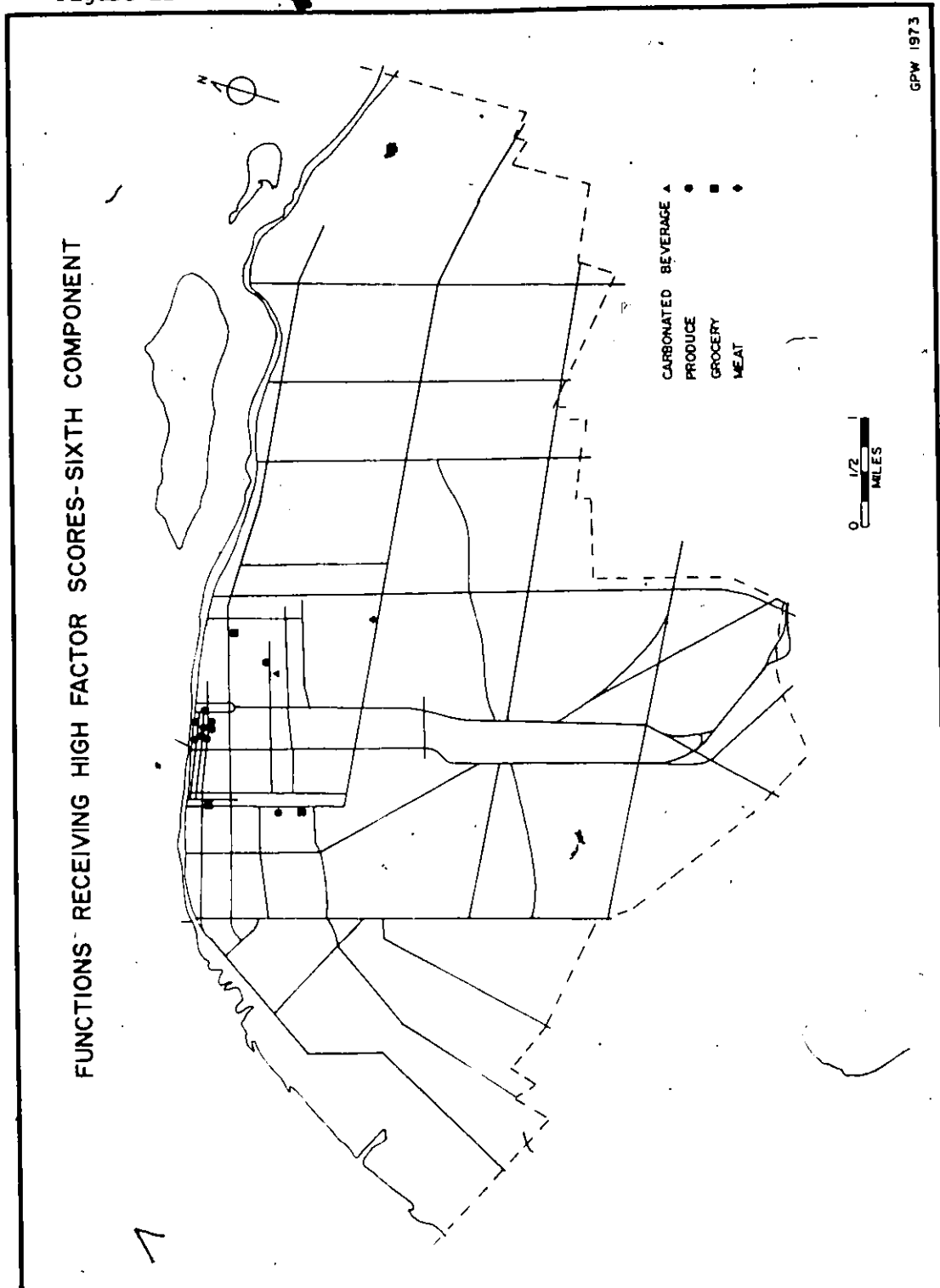
Of the fifteen wholesalers which received the highest scores in this component ten were produce outlets, all of whom are clustered around the city market. Grocery distributors make up the remaining five high scores of this component and as Map 11 indicates, they are all located upon streets having good access to truck routes.

#### ANALYSIS OF THE RESULTS OF THE FACTOR ANALYSIS

The dominant recurring trend evidenced in the factor analysis is the clustering of the produce wholesalers in the area of the city market for as they state reasons for proximity to customers and other wholesalers. This, in the minds of these distributors, gives them several notable benefits. They have the drawing power of the G. B. D., they profit from its facilitative services, (banks, finance companies, parking, policing), and it permits inter-trade among themselves. Since these distributors are dealing in perishables their clustering corresponds to Beckman's statement that retailers dealing with perishable goods find it advantageous to visit a central market and make their purchases quickly.

In analyzing the reasons cited by the produce distributors for their location, several questions can be raised.

Figure 11



1. Several of these distributors specifically stated inter-trading as a reason for their site selection. However, when asked how often or in what quantities this trading is done, none could state regularity or amounts. The two most common replies to the questioning were "every now and then" and "whenever I need to".
2. The produce distributors of the market area rely primarily upon walk-in retail trade for their subsistence and the drawing power of clustering and of the C. B. D. enhances this. This was not mentioned by any of this distributor group as a reason for their locating in the market area. Yet, one of these distributors stated that over 70% of his business was retail.
3. Although the members of the produce cluster of the market realize that there are definite advantages to clustering and that the market area is too congested for proper movement, most have not considered relocating the cluster in a more accessible location. Various reasons could be cited for this. The market area, in Windsor's zone of transition, is one which is scheduled for urban renewal; the buildings - old hotels, residences, retail outlets, warehouses, and small industrial complexes have declined in value making it economically feasible to operate space-consuming wholesaling and warehousing uses. Already many of these buildings have been removed making way for modern retail establishments. The displaced produce wholesaler, however, does not move from the market area but relocates in one of the many vacant buildings of the area. Eventually, most of them will be forced to move due to urban renewal, yet they are not planning on any specific area. The move, when

forced, will probably be eastward one or two blocks to an area of deterioration, but one which is not scheduled to be torn down for some time.

A more distant move to an area away from the market would be beyond the ability of many of these distributors. They are primarily family run outlets using husband, wife and children and often relatives. Their delivery vehicle is often the family station wagon or a truck bought second or third hand from another distributor. A move to a new area, one where they would have the burden of constructing a building of their own, would simply be too costly.

4. An important factor in the creation of a cluster in the produce market which was totally disregarded in their comments by the distributors of Windsor's market was quality control and price setting. There exists in a produce market wide differences in the quality and condition of fruits and vegetables with the result that there is considerable price manipulation and selective shopping.<sup>108</sup> There is a need for intimate market contact among dealers as well as between buyers and sellers in order to arrive at reasonable prices. This determination of fair prices is complicated by the increased or diminished production of produce due to seasonal change, disease, rise of new producing areas and other factors.<sup>109</sup> This is especially important in a city such as Windsor where there is no trade commission which establishes minimum standard for both quality and price.

The failure of Windsor's produce distributors to mention this is indicative of their attitudes towards their business - they are moderately successful being located where they are and they associate this with the market but they fail to see or plan beyond this. They seem to fail to fully

108. Ransome, p. 106.

109. Ibid.



This illustrates the market and the new retail complex built in an effort to revitalize the area.



Pearl's is just one of the wholesalers located in what was a retail establishment. This is his second location in the market area and he will soon be forced to move again. His plans are to move further east on Pitt Street.

understand the value of clustering, the fact that even without the market, by being located in a cluster they would have more drawing power than the individual outlet. It should also be mentioned that many of the smaller produce distributors of the market area are first or second generation immigrants and have located in the market area because it is a type of ethnic ghetto with which they can associate. They have no wish to relocate because in the market area they can follow closely the movement of their competitors. Thus, it would appear that although the produce distributors either fail to fully understand the advantages of clustering, or they just do not wish to admit the value to others, they definitely do realize that there are certain advantages to their location.

As revealed in the factor analysis, the most important locational influence for grocery distributors is their need for good accessibility to truck routes. They also felt that inexpensive land, low rent, area for abundant parking, and suburban space allowing freedom of movement in all directions were important.

Of the grocery distributors mentioned in the factor analysis, three have relocated and two of these did conduct locational studies. One that delivered most of its sales felt that accessibility was its most important locational influence but did mention inexpensive land, stating that his old site was both too expensive and congested. The other distributor which conducted a locational study has part of his sales picked up and he felt that accessibility to truck routes was of prime importance, but thought proximity to customers was also important.

The one distributor which relocated but did not conduct a location study rated suburban space and freedom of movement in all directions as his first preference and accessibility to truck routes as his second. Ironically,

the site he selected is not suburban, and it was not when he selected it. He does have accessibility to truck routes.

In general, the grocery distributors seem more aware of the characteristics of their sites than the produce wholesalers, or at least are more willing to discuss the topic than the produce wholesalers.

Another significant trend made evident in the principal component analysis is the decline in importance of the railway as a traditional location factor.

Of the grocery and confectionary wholesalers responding to the questionnaire, only three have private railway spurs and none of these is used very extensively. The reasons cited for this decline in railway influence were:

- 1) The railway is not dependable in delivery. Shipments of perishables have been known to be lost in transit and not found or delivered for weeks.
- 2) Trucks are generally faster than rail.
- 3) Prices are approximately the same for shipping most goods, although heavier goods are less expensive when shipped by rail. However, all of the wholesalers concerned felt that this price advantage was offset by the undependability of rail so that they preferred to ship by truck.
- 4) A very pertinent fact in the shipping of perishables is time spent in transit. A truck makes its deliveries immediately when it arrives in a city while a box-car may spend days in the switching yard just waiting to be moved or unloaded.

This decline of the importance of rail facilities is emphasized by Paul Bondy of the Windsor Industrial Commission who states, when referring to manufacturers and wholesalers that, "In the last few years, more plants



have been established without rail than with -- but rail is still used by heavy manufacturing."<sup>110</sup>

A final revelant characteristic revealed in the factor analysis was conspicuous by its absence -- the failure on the part of the distributors to have conducted studies to find an optimum location. .

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<sup>110</sup>. From an interview with Mr. Bondy. March 25, 1971.



These grocery distributors, National (top) and Boultons (bottom) have private rail spurs. However, both state that due to delivery problems with rail, most of their goods are shipped by truck.





This distributor states that he located specifically to have a private rail spur. However, he now states that due to delivery problems and because in most cases rail and truck cost approximately the same, he now uses truck almost exclusively.



This distributor, Thompson Produce, once had a private spur and loading area, but through lack of use it fell into disrepair and he found it more convenient to remove it than to repair it.

### ANALYSIS OF QUESTIONNAIRE

It was the purpose of the previous section, the principal component analysis, to examine the variables obtained from the questionnaire data by means of a fundamental set of components. This section based upon empirical data taken from the questionnaire, will analyze the location of grocery and confectionary distributors by type.

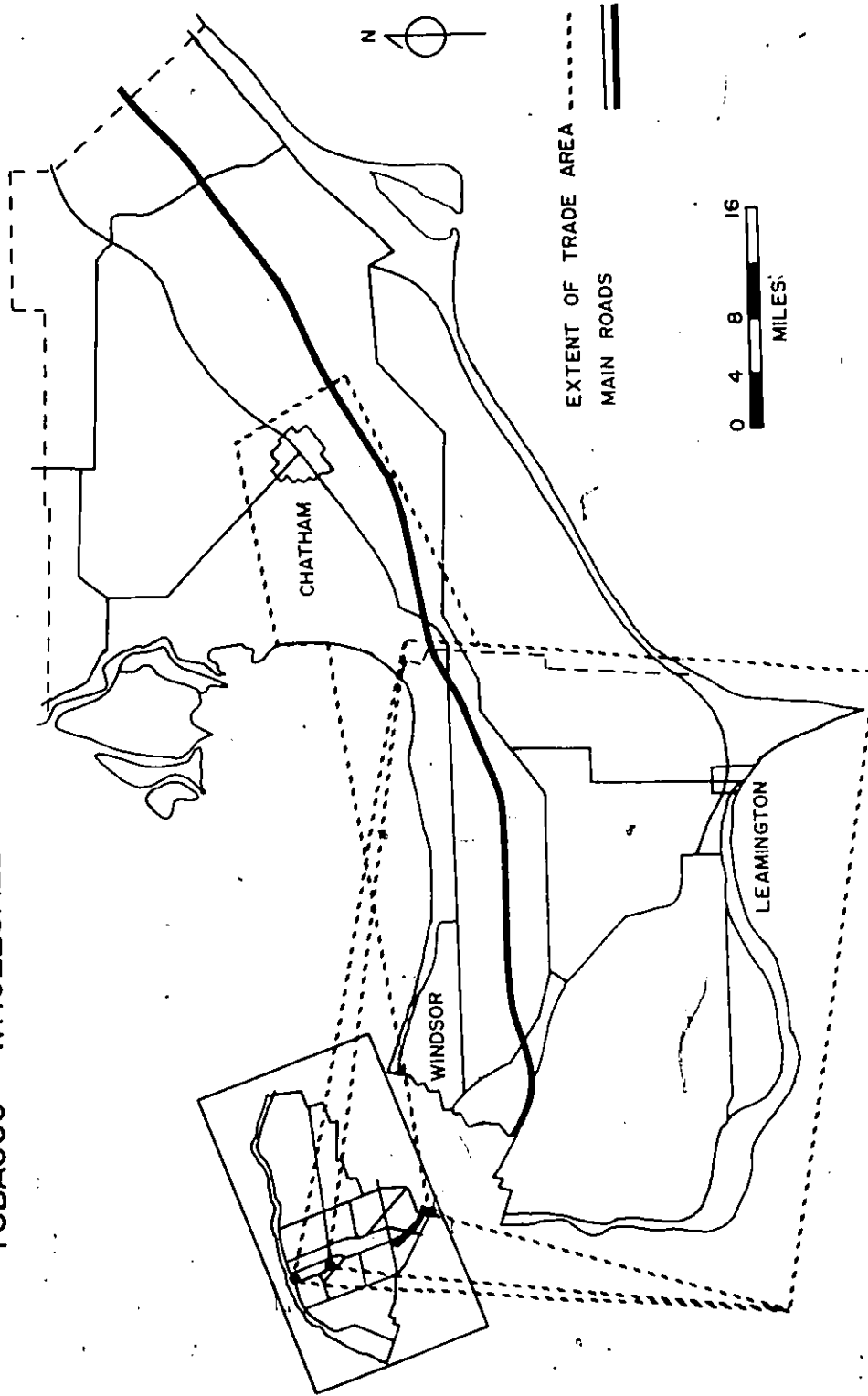
### TOBACCO DISTRIBUTORS

There are three tobacco wholesalers in Windsor, who all termed themselves merchant wholesalers with stock, selling to either retailers or other wholesalers. The trade areas of these distributors are almost identical, as Map 12 indicates, encompassing primarily Essex County. The extent of trade outside Windsor varied considerably, however, as it ranged from 15 to 60 percent of their total sales. The considerable variance evident in sales outside Windsor can be explained by the nature of the sales of the distributor. Wickens, the wholesaler having 60% of its sales outside Windsor's boundaries is primarily involved in cigarette and candy vending machines throughout Essex County. The other two distributors, although they each trade in Essex County, have a more limited amount of sales outside Windsor's boundaries.

Two of these distributors have relocated, one once and the other four times. Both maintained that their motivation for relocation was prompted by the need for expansion, since their old locations were too congested and they wanted easier access to their customers. Of these three distributors, only one conducted a location study. Ironically, it was the wholesaler who has relocated four times. By interview, it was found that the methods of study employed to relocate by this distributor were based

MAP 12

# TOBACCO WHOLESALERS AND THEIR HINTERLAND 1970



GPW 1973

upon assumptions and that no factual evidence was uncovered which would denote the most beneficial location. The fact that this wholesaler has relocated four times indicates that the selections were short range solutions to immediate problems. The reasons cited by this distributor for his relocations are the same in every case:

- 1) needed room for expansion
- 2) wanted more accessibility
- 3) old site too congested

Although the reasons for locating are generally the same, good access to truck routes and adequate truck and customer parking, there are two notable exceptions when considering weighted locational influences. One distributor feels that a suburban location allowing freedom of movement in all directions is the most important locational consideration while another is of the opinion that the prestige of central office space is of prime concern.

For tobacco distributors in Windsor, a convenient location is essential because all three share approximately the same market. The only one with a special emphasis in a certain area is Wickens with its vending machines. Their customers are drug stores, supermarkets, confectionaries, any store selling cigarettes and, to a lesser extent, candy either in the city or county. Of course, the tobacco trade customers may take delivery from any one or all three wholesalers depending upon prices at the moment of need.

The casual attitude of the tobacco distributors towards location is reflected in their sites. The distributor having but 15% of his sales outside the city's boundaries is in fact located outside the city's boundaries, not as a tax-saving move, but due to the accessibility it offers to the truck routes entering the city.

Table 14

Description of Activity	Distribution Area	Percent of Sales Outside Windsor's Boundaries	Times Relocated	Location Study Conducted	Reasons for Relocation	Reasons for Location	Weighted Most Important	Percent of Goods Delivered	Floor Area	Number of Floors
1	Essex County	33	0	No			6; 5	100	Sq. Ft. 10,000	2
1	Essex County	60	1	No	1		2; 4	3	N/A	1
1	Essex County	15	4	Yes	X; 2; 3		7; 3; 4	98	Sq. Ft. 10,000	1

TOBACCO WHOLESALERS

Description of Activity - (1) Merchant wholesaler with stock

Reasons for Relocation - (1) Required room for expansion  
 - (2) Wanted easier access to markets  
 - (3) Old location too congested.

Reason for Location - (1) Inexpensive land  
 - (2) Inexpensive rent  
 - (3) Good access to truck routes  
 - (4) Adequate truck and customer parking  
 - (5) Proximity to customers  
 - (6) Prestige of central office space

- (7) Suburban space and freedom of movement  
 - (8) Proximity to other wholesalers  
 - (9) Bought existing facilities  
 - (10) Located in home  
 - (11) Close to rail facilities



The distributor which deals primarily in vending machines and has most of its sales outside Windsor's boundaries is located in an old drug store in an area which although it is accessible to main highways, does not have any off-street parking which would be desirable for their type of operation.

The remaining tobacco distributor is located downtown in an area which the owner states is "more or less in the center of our market". He admits, however, that the site is not as good as it once was due to congestion, a lack of room for expansion, and the constantly expanding city, but that they owned the building and the land so that was where they were staying.

Only Morton Tobacco, on the southern outskirts of Windsor has the accessibility to city and county highways, ample parking and abundant room to expand. It appears that in view of Windsor's future southern extension and the rising cost of land that Morton's site selection was a sound choice.

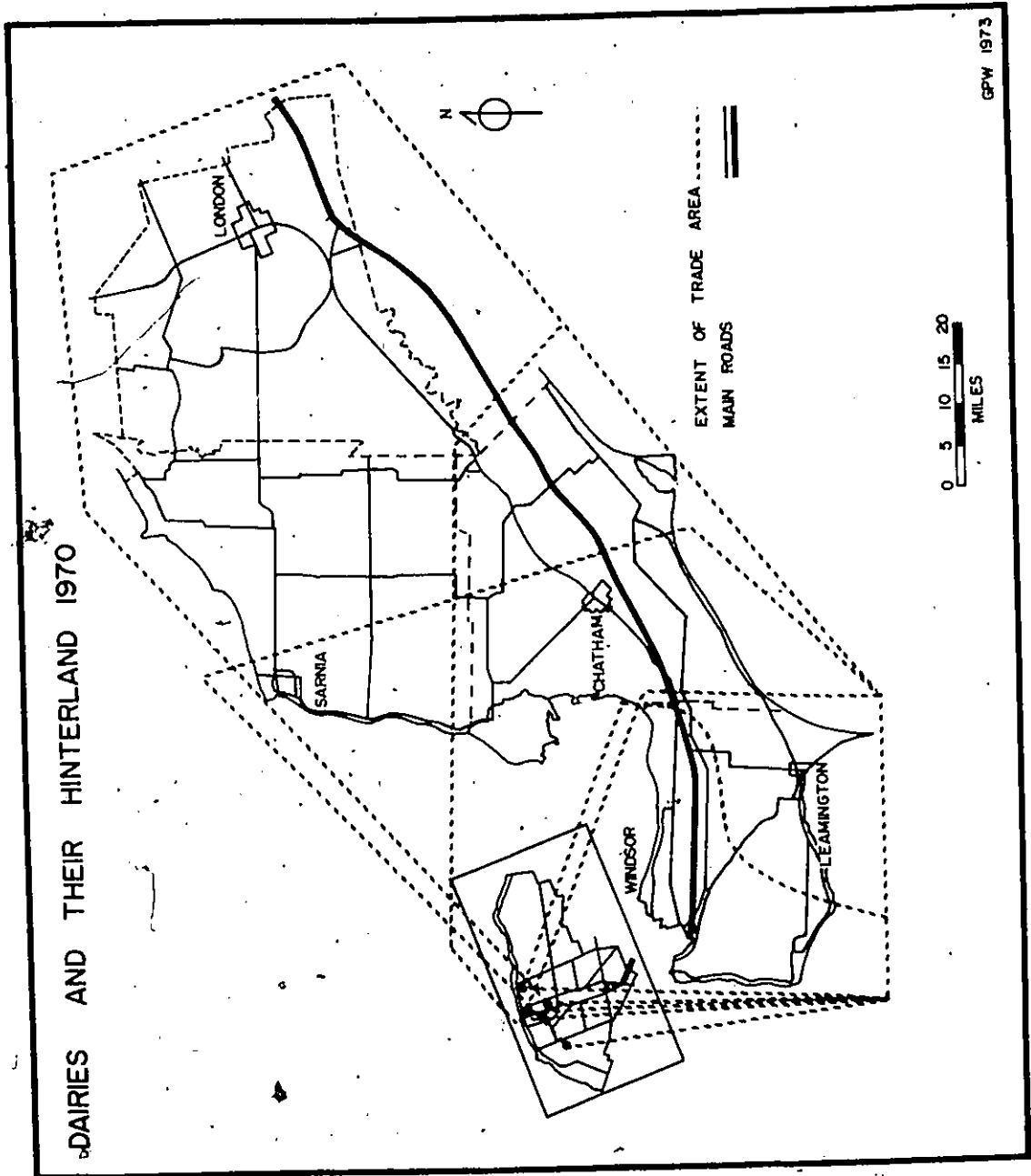
#### DAIRY DISTRIBUTORS

The Department of Agriculture defines dairies as being processors, while the outlets in Windsor term themselves merchant wholesalers with stock or in the case of one, a retail/wholesaler. Since dairies both produce their products and distribute them, their locational preferences had to be carefully studied to answer the following question -- did they locate as a distributor or as a manufacturer? The dairies themselves are located in industrial areas but those interviewed at the dairies stated that they selected their locations as distributors seeking maximum accessibility.

As Map 13 indicates, the trade area of the dairies includes portions of Essex, Kent, Lambton and Middlesex Counties. The extent of

MAP 13

DAIRIES AND THEIR HINTERLAND 1970



their trade area varies from 15 to 44 percent of their total sales. There is one exception. Twin Pines Dairy stated that their trade area did not extend beyond Metropolitan Windsor boundaries. The largest dairies exhibit a wide range in the proportion of sales transacted outside Windsor.

Purity and Sealtest state that 25 percent of their total sales are outside Windsor while for Silverwood Industries it is 44 percent and for Bordens, it is 15 percent. The dairies state that the range in sales outside Windsor exists because of their individual marketing procedures and the proximity of another dairy, in Chatham, of the same company. Also, in several of the smaller communities, i.e., Kingsville, local dairies are well-established and these areas are not generally challenged by the larger chain dairies. Dairy commodities are homogeneous and the margin on absorbing transportation costs is slim.

Dairies function as manufacturers, wholesalers and retailers. Their markets vary accordingly as do their sites. However, as the dairies, especially the largest, are very competitive, they do agree upon major locational considerations, i.e., good access to truck routes and the necessity of suburban space that permits freedom of movement in all directions. More considerations mentioned by other dairies are proximity to customers and prestige of having central office space, while the last indicated that they merely purchased existing facilities.

The dairies are not located in any one area but are spread out across the city. The dairy which ships the least outside the city, is the one which purchased existing facilities. This distributor is more centrally located, the farthest from the city boundaries, but with good truck accessibility. In buying existing facilities over forty years ago, this dairy minimized land and building costs. Today they operate on less

Table 15

Description of Activity	Distribution Area	Percent of Sales Outside Windsor's Boundaries	Times Relocated	Location Study Conducted	Reasons for Relocation	Reasons for Location Weighted Most Important First	Percent of Goods Delivered	Floor Area	Number of Floors
1	Essex County	0	0	No	-	1; 2	50	N/A	2
2	Essex County	15	0	No	-	3	100	N/A	1
2	Tri-County Area	44	1	Yes	1; 2	4; 5	100	20,000 Sq. Ft.	3
2	Essex, Kent, Lambton, Middlesex	25	0	No	-	4; 5	97	N/A	2
2	Essex, Kent	35	0	No	-	5; 4	100	9,000 Sq. Ft.	2

DAIRY WHOLESALERS

Description of Activity - (1) Merchant wholesaler with stock.  
- (2) Retail/Wholesale

Reason for Relocation - (1) Need for expansion  
- (2) Old location too congested

Reason for Location - (1) Proximity to customers  
- (2) Prestige of central office space  
- (3) Bought existing facilities  
- (4) Good access to truck routes  
- (5) Suburban space and allows freedom of movement in all directions

than two-thirds of the land and building space they own there.

Purity and Sealtest Dairies are the same organizations in Windsor and they occupy the same buildings. They are centrally located in the city and they have truck accessibility to both the city and the county where they send approximately 25 percent of their total sales.

The last of the large dairies, Silverwoods, was the only one to relocate and they stated that they did conduct a location study. In relocating, this dairy indicated that they required area for expansion although it was not known by the person interviewed, what facts were considered when the present site was selected. Silverwoods has the greatest amount of total sales outside Windsor, a fact reflected in their location on Huron Church Line Road, one of the city's main truck routes, connecting with Route 401 and Highway 3. This location places the dairy on the west side of the city but does permit ready accessibility to the eastern sections.

Of the two remaining dairies, Twin Pines, with none of its sales outside the city, is centrally located on a site they have occupied for thirty-three years. This site is important for this dairy because fifty percent of their sales are picked up at the dairy by customers. (Of the other dairies, only one stated that they had many pick ups and theirs amounted to approximately 2.5 percent of their total sales).

The final dairy, Multi-Milk has approximately thirty-five percent of their total sales outside Windsor. Because of this, their location is truck oriented with accessibility to both city and county roads.

The dairies in general recognize the importance of a good location and indicate their locations may not be optimal, but at present it is too expensive to relocate.

CARBONATED BEVERAGES

Under the parameters established for this study, five of Windsor's six carbonated beverage distributors classify themselves as wholesalers, while the sixth is retail/wholesale. These distributors, like dairies, are manufacturers, wholesalers, and retailers. They are located in all types of areas, industrial, commercial and mixed land use, and they felt that it did not matter so long as the site was accessible to transportation routes. All but one delivers all of their sales. The one exception is a cash and carry located next to the 7-Up and Vernors plant. (All are owned by the same man). The owner feels that people will "go anywhere for a bargain".

As Map 14 indicates, trade areas of beverage distributors encompass Essex and Kent Counties. The extent of their sales accomplished outside Windsor varies from ten to thirty percent of their total trade. One of the distributors, Maedel's, however, claimed to have no knowledge as to the extent of his trade area outside Windsor's boundaries. Since there is also a Maedel's in Essex, it can then only be assumed that their trade area in Windsor must be primarily local in nature.

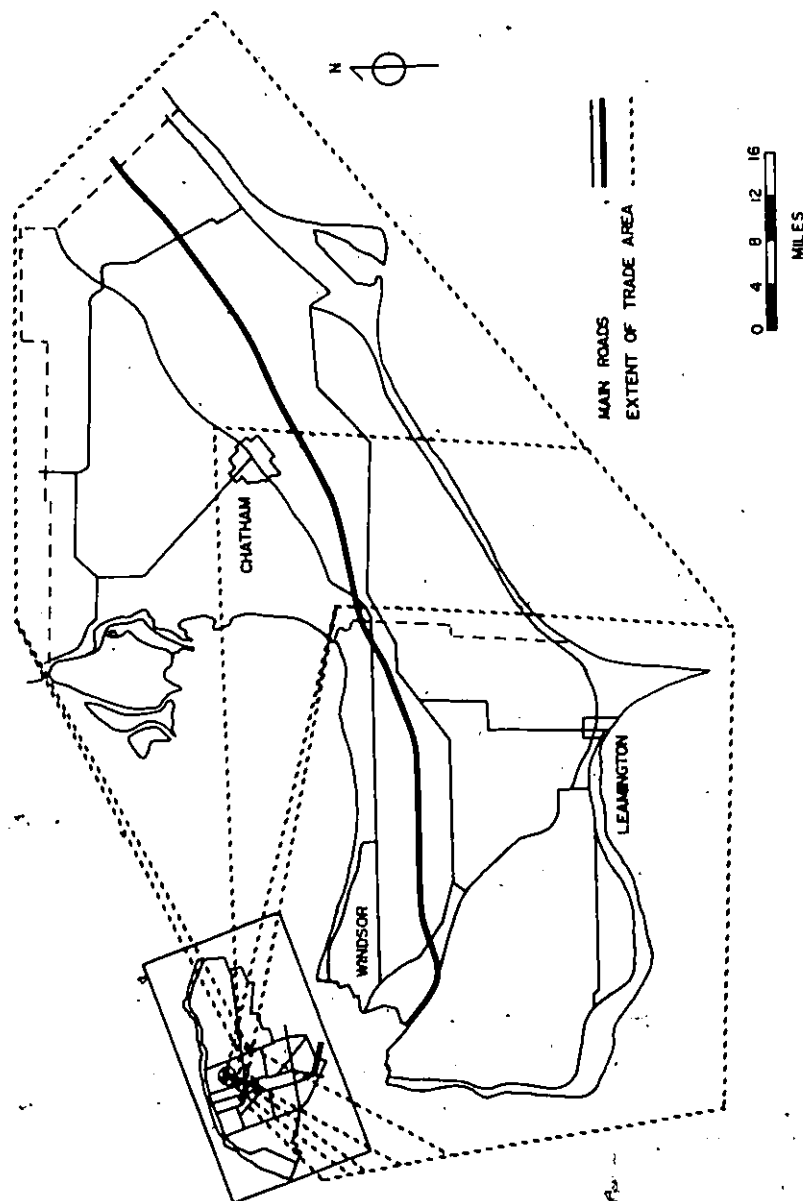
Of the 'pop' distributors, only one has relocated and he did so due to a need for expansion. In relocating, a study of possible sites was not undertaken, but rather existing facilities were bought. Since all sales are delivered, this distributor felt that "one location was as good as another". However, in buying existing facilities, which had been previously used by a carbonated beverage distributor, the distributor knew that the site could be operated successfully and perhaps a study had been undertaken by the original owners.

Three of the distributors stated that they did conduct location

MAP 14

## CARBONATED BEVERAGE DISTRIBUTORS AND THEIR HINTERLAND

1970



GPW 1971

Table 16

Description of Activity	Distribution Area	Percent of Sales Outside Wholesaler's Boundaries	Times Relocated	Location Study Conducted	Reasons for Relocation	Location Weighed Most Important First	Percent of Goods Delivered	Floor Area	Number of Floors
1	Essex County	20	1	No	1	1	100	7,000	2
1	Essex, Kent	30	0	Yes	-	2; 3	100	N/A	1
1	Essex, Kent	N/A	0	Yes	-	2; 3	100	N/A	1
1	Essex, Kent	25	0	No	-	5; 4	100	33,000	1
1	Windsor, Chatham	25	0	Yes	-	4; 2	100	N/A	1
2	Windsor-Leamington	10	0	No	-	6	0	N/A	1

# CARBONATED BEVERAGE WHOLESALERS

Description of Activity - (1) Distributor  
- (2) Retail/wholesale

Reasons for Relocation - (1) Needed room for expansion

Reasons for Location  
- (1) Bought existing facilities  
- (2) Good access to truck routes  
- (3) Suburban space and allows freedom of movement in all directions  
- (4) Proximity to customers  
- (5) Prestige of central office space  
- (6) Proximity to other wholesalers



studies. Two of these are largely international firms, who perform the location work for their local plants. The persons interviewed at these plants expressed no knowledge as to how the plants were located. The third stated that he investigated several sites and that he bought the one which he felt was the most convenient, offering access to truck routes and freedom of movement in all directions.

Due to the widespread nature of retail 'pop' distributors in Windsor, a location which has accessibility to all sections of the city is important. Map 14 shows all the beverage distributors locations are fairly central to Windsor retail stores, where most of their deliveries are made. The distributor having the greatest percentage of his total sales outside Windsor, Canada Dry Ginger Ale, is located on Walker Road, accessible to both the city and the county retailers.

The distributor which classified itself as a retail/wholesale outlet is located next to its source of supply, another distributor. This establishment is cash and carry only and its location on a limited access street places it at a disadvantage. No location study was conducted by this distributor. It was assumed, however on his part, that situating close to his main source of supply was best. It was possible the distributor admitted, that profits could be lost due to the inadequacies of the site. A comprehensive study might have revealed that a more convenient location with better accessibility for cash-and-carry customers would be more profitable.

#### GROCERY WHOLESALERS

As Map 15 illustrates, Windsor has nine grocery wholesalers, eight of whom term themselves merchant wholesalers with stock with the last being a retail/wholesale outlet. The trade area of these distributors

MAP 15

# GROCERY WHOLESALERS AND THEIR HINTERLAND 1970

EXTENDS TO  
INCLUDE  
TORONTO

EXTENT OF TRADE AREA-----  
MAIN ROADS

0 5 10 15 20  
MILES

GPM 1973

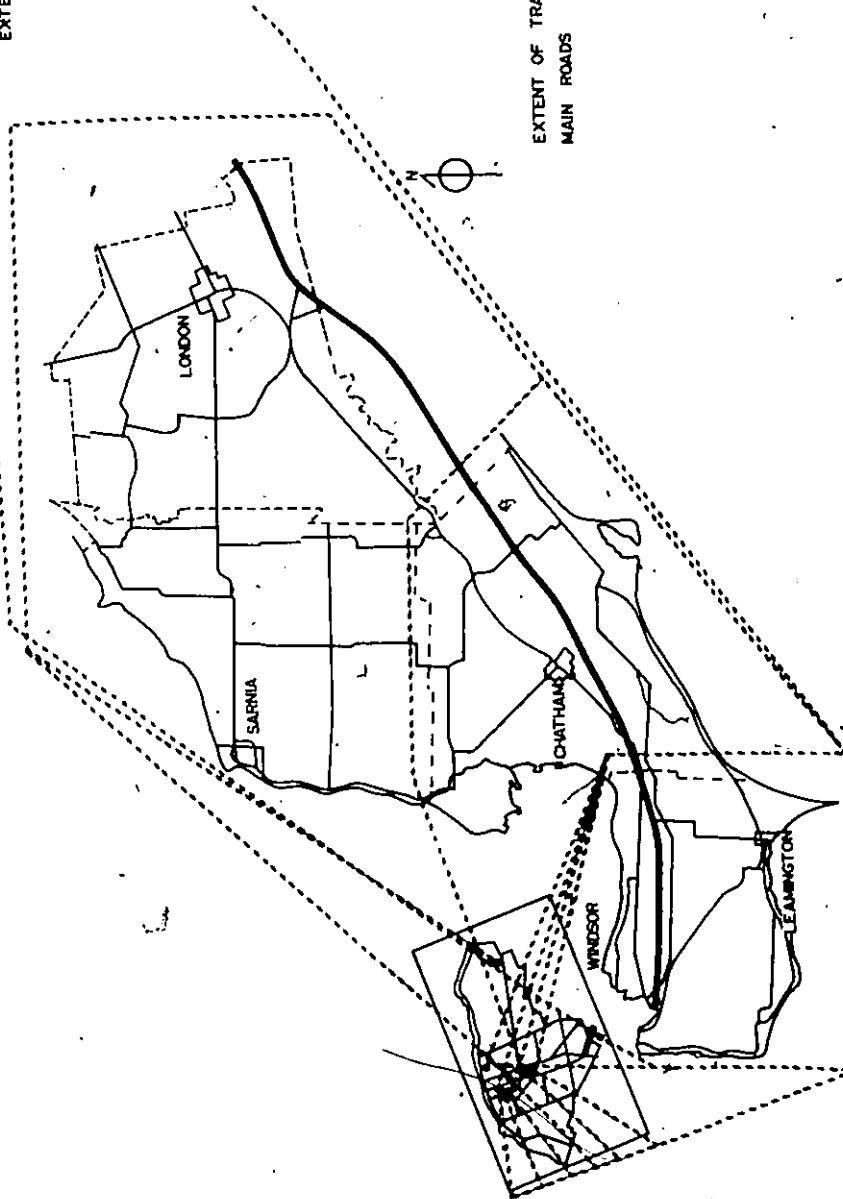


Table 17

Description of Activity	Distribution Area	Percent of Sales Outside Windsor's Boundaries	Times Relocated	Location Study Conducted	Reasons for Relocation	Reasons for Location Weighted Most Important First	Percent of Goods Delivered	Floor Area Sq. ft.	Number of Floors
1	Most of Tri-County Area	50	1	No	1	2; 3	100	400	N/A
1	Extend to Toronto	75	0	No	-	1; 2	100	2,000	N/A
1	Essex County	30	0	Yes	-	4; 2; 5	100	35,000	N/A
1	Essex County	50	0	Yes	-	4; 2; 5; 6	90	51,000	N/A
2	Essex County	10	0	Yes	-	6	30	1,500	N/A
1	Detroit 100 Mile Radius of Windsor/Detroit	60	1	Yes	1; 2	7; 2	100	21,000	N/A
1	Essex County	8 - 10	1	No	1	2; 6	95	19,700	N/A
1	Essex County	7	1	Yes	1; 2	2; 7	100	8,000	N/A
1	Essex, Kent	10	0	No	-	2; 7; 1	0	14,000	N/A

GROCERY WHOLESALERS

Description of Activity - (1) Merchant wholesaler with stock  
- (2) Retail/Wholesale

Reasons for Relocation - (1) Required room for expansion  
- (2) Easier access to markets

Reasons for Location - (1) Inexpensive land  
- (2) Good access to truck routes,  
- (3) Prestige of central office space  
- (4) Proximity to railroads  
- (5) Adequate truck and customer parking  
- (6) Proximity to customers  
- (7) Suburban space and freedom of movement in all directions

extends from Windsor to Toronto with the extent of trade outside Windsor varying considerably. It ranges from 7 to 75 percent of their total sales. With such a great variation in percentage of trade outside Windsor, it might be hypothesized that each has a distinct territory or places special emphasis on a given line of products. While this is not true of most of the grocery distributors as most sell the same type of products, the two distributors which have the largest trade area and the greatest percentage of their total sales outside of Windsor do specialize. Windsor Food Distributors has a trade area which extends to Toronto, and 75 percent of their sales occur outside Windsor. They sell almost exclusively goods imported from the United States and for which they are the only area distributors. This distributor is located on the eastern fringe of Windsor on land which he terms both "cheap and accessible to truck routes". To meet these ends Windsor Food Distributors is well located.

The other distributor who has a larger trade area and a high percentage of goods sold outside Windsor (60 percent of their total sales), is Marshes Frozen Foods. Marshes, like Windsor Food Distributors, specializes in certain products, namely meats (special cuts sold to restaurants and institutions) and frozen food, i.e., fish and shrimp. Mr. Marsh stated that his prime locational advantage was good accessibility and his choice of a site just beyond Windsor's southern boundary is accessible to both city and county roads.

Of the nine grocery distributors in Windsor, four have relocated, and of these two conducted location studies. In relocating, both agreed that their major reason for their move was that they required additional area for expansion and easier access to their customers. The two distributors who relocated and did not conduct studies also moved

because of a need for expansion. The difference between the wholesalers who conducted studies on relocating, and those who did not, is that the former believed accessibility was of prime concern. The distributors who did not conduct studies felt that proximity to customers and the prestige of central office space were important. Less than five percent of their sales were delivered.

Of the five wholesalers that have not relocated in this group, three asserted they conducted locational studies. Two of these distributors located primarily due to the proximity of rail facilities and accessibility. Today, however, they stated the rail would not play as important a part in their site selection since most of their goods are now shipped by truck. The last outlet which said they conducted a study located because of proximity to customers.

The final two grocery distributors are those that have not relocated and did not conduct a location study. For these wholesalers, the prime locational influences were accessibility and inexpensive land.

Thus, fifty-six percent of the city's grocery wholesalers have conducted location studies, which is the highest rate for any of the groups interviewed (none indicated that they used a geographer or other professional in their site selection). However, in spite of the high percent of grocery distributors who have conducted location studies, the nature of these studies and their thoroughness as well as their relevance today must be questioned. Two located because of proximity to rail facilities, one 26 years ago, the other 40 years ago, and as previously stated both admit rail facilities would not be a major locational influence for them today. A third distributor who stated that he conducted a location study is primarily retail, selling imported products in a heavily foreign

populated section of the city. This distributor did not elaborate on his method or main influences in site selection other than he wanted to be close to his customers.

The final two distributors gave the impression of conducting the most comprehensive location study and both are well located. Both Marshes and Meisner Confectionary Supply know the type of area in which they wished to relocate. They then found what they felt best approximated their wishes and needs. Both required a site accessible to truck routes, having room for expansion and freedom from congestion. Neither of these distributors mentioned the use of maps or traffic flow data in their site selection. Meisner primarily compared sites on a cost and accessibility viewpoint. Marshes investigated future trends in city expansion as well as comparing sites on a cost and accessibility viewpoint. As a result of their study, Marshes not only purchased the site of land on which they are located, but much of the surrounding land on the speculation that other wholesalers or manufacturers might find the location advantageous and seek to locate there also.

#### PRODUCE DISTRIBUTORS

Produce distributors, including fruits and vegetables, number sixteen in Windsor and comprise the largest number of the city's grocery and confectionary suppliers. The trade areas of these distributors range from Windsor to all across Canada, in addition to several American states. The proportion of their market outside Windsor's boundaries varies as considerably as the trade areas themselves as it ranges from 0 to 90 percent of total sales.

Of the city's sixteen produce distributors, twelve have a trade

area that includes Windsor, Essex County and Detroit. Of these distributors, two indicated they conducted locational studies with both emphasizing proximity to customers as being their most important locational influence. The remaining ten produce distributors agree, with one exception, upon the importance of a location's proximity to customers. The one exception bought existing facilities with direct rail access since it was felt that rail transport was less expensive than other means. Since this particular wholesaler located, however, his opinion has changed and although he is still of the opinion that rail is less expensive, it is also more inconvenient, with the result that most of this goods are received by truck at present.

The remaining four outlets have trade areas that extend all over Canada and the western United States. None of these distributors completed a study in an effort to find an optimal location. Their stated motives for location differ considerably:

- 1) proximity to customers
- 2) inexpensive rent
- 3) accessibility
- 4) one is located in his home

Ten of the sixteen produce distributors have relocated. Five of these because their old locations were expropriated; three wished to be closer to the market and two required room for expansion. Of these ten, one only indicated that he conducted a location study and he is the distributor that located for rail facilities.

The Windsor Market area represents the city's only wholesale cluster. Eleven of the city's produce distributors are grouped near the market for reasons which include proximity to customers, other wholesalers and for the prestige of having central office space. None of the distributors

in this cluster however conducted a location study. The distributors in the cluster state that approximately 75 percent of their sales are picked up by people doing comparison shopping. This is what they put forth as evidence that their most beneficial location is the cluster.

The almost casualness of produce distributors in Windsor towards optimal locations is surprising in view of the fact that Essex County is one of Canada's major suppliers of fruits and especially vegetables, some of which are grown year-round by the extensive use of greenhouses (i.e., tomatoes and cucumbers). Because of the produce grown so close to Windsor, competition is created in the form of distributors in Leamington, and surrounding communities, and in the form of highway and main road fruit stands of the producers themselves. For these reasons, the necessity of an optimal location for Windsor's produce distributors would appear to be obvious. That this is not the case, there are several possible answers.

The distributors themselves, feel that the city market area is where the bulk of their business is generated from so they simply went to where the business was. Also since Windsor is not a major market for Essex County, produce and the produce distributors of Windsor do not really fear the competition from the county. In fact, although the city does receive produce from the county, it also takes shipment of fruits and vegetables from the United States. The questionnaire revealed that a number of the produce distributors, i.e., Nassr Fruits and John Catalano Limited, do import fruits (citric and non citric) and vegetables from the States, especially California and Florida.

A final explanation may be the fact that most of the produce distributors are of European descent and may locate where they are because





Table 18

Description of Activity	Distribution Area	Percent of Windsor's Sales Outside Boundaries	Times Relocated	Location Study Conducted	Reasons for Relocation	Reasons for Location Weighed Most Important	Percent of Goods Delivered	Floor Area	Number of Floors
1	Essex County	10	0	No	-	1;2;3	100	12,000 sq. ft.	1
1	Essex County	N/A	0	No	-	N/A	100	N/A	1
1	Windsor-Montreal	70	1	No	1;2;3	2	100	180	1
2	North America	90	0	No	-	3;2;4	100	N/A	2
1	Windsor-London	10	1	No	4;5;6	2	100	4,000	2
2	Windsor-Toronto	30	0	No	-	2;3	90	3,900	1
1	Essex County	5	1	Yes	5;6	2;4	90	2,000	1
1	Windsor	1	0	Yes	7	5;3;4;6	100	2,000	1
2	Windsor	0	1	No	5;6	1	50	1,800	2
2	Windsor	0	0	No	-	2	90	700	1
2	Windsor	0	1	No	2;3	2;4	75	660	1
1	Windsor	1	1	No	5;6	5;3;4;2	95	2,300	2
2	Windsor	2	1	No	6;1	2	92	2,000	1
1	Windsor	1	1	No	5	4;2	80	6,000	1
1	Alta.-Nfld.	90	0	No	-	7	100	N/A	N/A

PRODUCE DISTRIBUTORS

Description of Activity-(1) Merchant wholesaler with stock  
-(2) Retail/Wholesale

Reasons for Relocation

- (1) Inexpensive rent
- (2) Proximity to customers
- (3) Proximity to other wholesalers
- (4) Required room for expansion

Reasons for Location

- (1) Prestige of central office space
- (2) Proximity to customers
- (3) Good access to truck routes
- (4) Proximity to other wholesalers

- (5) Old building torn down
- (6) Wanted to be closer to market
- (7) Wanted to be more centralized

- (5) Inexpensive land
- (6) Suburban space and freedom of movement
- (7) Located in home

of ethnic affiliations - the market cluster for its strong ethnic clientele - Erie Street East for its Italian ghetto. For these produce distributors this could be a way of life, one which he takes for granted and does not consider a motivating factor in his site selection. However, even if he did recognize it, he may, as stated before not want to mention it.

#### MEAT DISTRIBUTORS

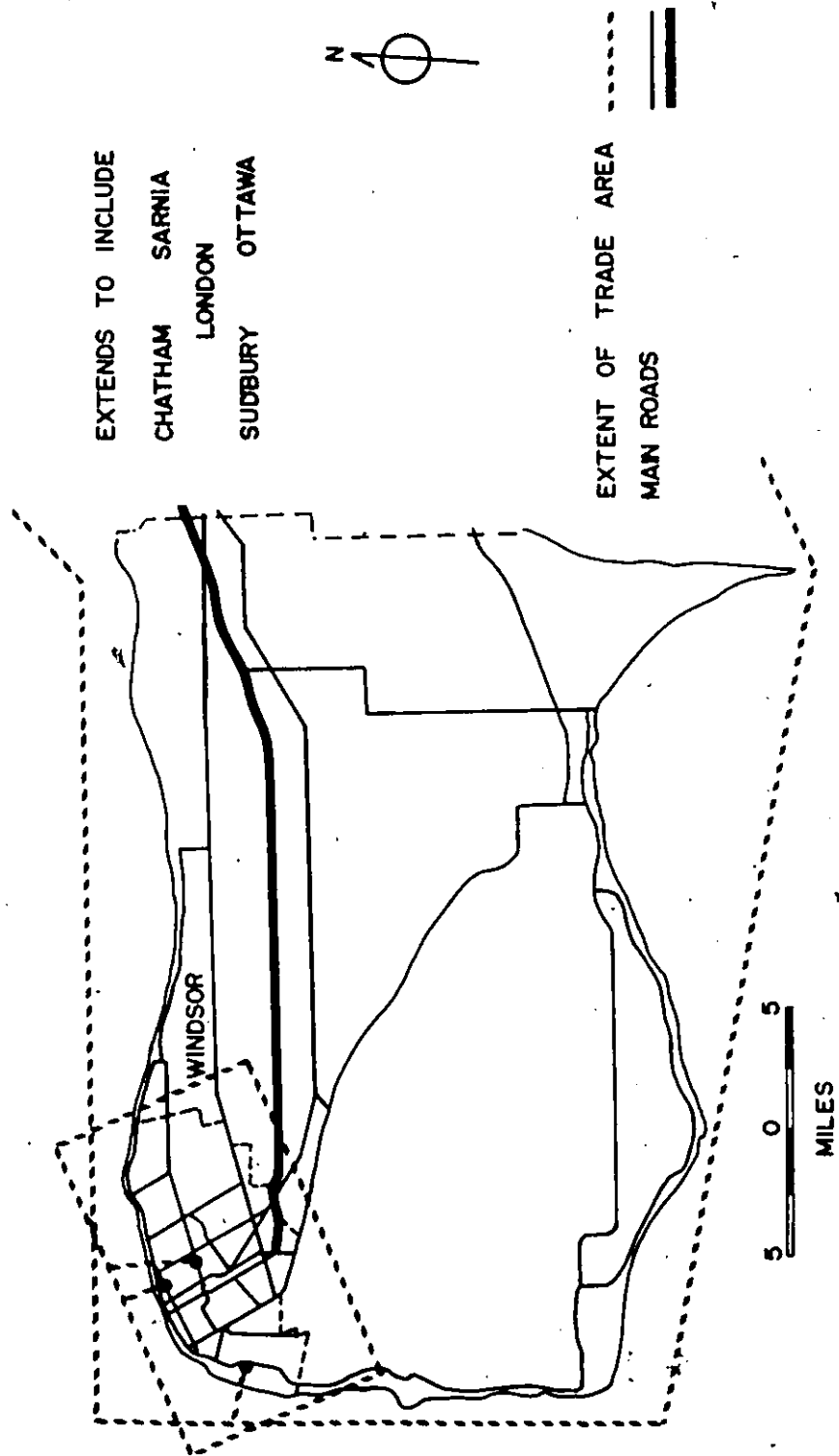
Windsor, as is illustrated on Map 17, has but three meat wholesalers, who serve restaurants, retailers, manufacturers, institutions and other wholesalers. Only one of these has a trade area extending beyond Windsor's boundaries and it includes most of Southern Ontario, accounting for some 40 percent of his total sales. This distributor is not only the only one to state that he conducted a location study prior to locating but he is also by size the largest of the meat distributors.

Of the three outlets only one has relocated and he has done so three times, each time buying existing facilities out of a need for increased area. This distributor now has 3,000 sq. ft. of area as opposed to 18,000 sq. ft. for the largest and 1,000 sq. ft. for the smallest. The remaining meat distributor, the smallest, has been located in the same building for over forty years. As only about 25% of his total sales were wholesale, he stated that one of his main locational factors was the lack of any nearby retail competition, and that there was a dense residential build-up all around his site.

The meat wholesalers in Windsor are dispersed across the city on major east-west arteries. As they all deliver at least part of their sales, this accessibility is necessary. The distributor with sales outside the city's boundaries is located so as to be accessible to both city and county roads. This distributor, Schwab's, serves, as is indicated by the map, a large hinterland. His sales in more faraway,

MAP 17

# MEAT WHOLESALERS AND THEIR HINTERLAND 1970



GPW 1973

Table 19

Description of Activity	Distribution Area	Percent of Sales Outside Windsor's Boundaries	Times Relocated	Location Study Conducted	Reasons for Relocation	Location Weighed Most Important First	Percent of Goods Delivered	Floor Area Sq. Ft.	Number of Floors
1 Windsor		0	3	No	1	1; 5	100	3,000	1
2 Windsor - Ottawa		40	0	Yes	-	2; 3	100	18,000	1
2 Windsor		0	0	No	-	4	40	1,000	1

MEAT WHOLESALERS

Description of Activity - (1) Merchant wholesaler with stock  
- (2) Retail/wholesale

Reasons for Relocation - (1) Needed room to expand

Reasons for Location  
- (1) Bought existing facilities  
- (2) Good access to truck routes  
- (3) Inexpensive land  
- (4) Proximity to customers  
- (5) Needed room for expansion

places, i.e., Sudbury and Ottawa, are primarily to small food specialty shops and delicatessens which he services by truck "just about every week". The two distributors who conclude all their sales within Windsor's boundaries are both heavily dependent upon retail trade and their sites in heavily build up residential areas reflect this.

As the map indicates, none of the meat wholesalers are located in the central market area. Their absence from this area is partly because very little meat is imported from the United States. Also, there are numerous established meat retailers in the central market. The meat retailers - wholesalers admit that they are more oriented to neighbourhood markets in the corridors of strong streets.

The meat distributors of Windsor, although they number only three, are characteristic of the city's grocery and confectionary suppliers in matters of location. One claims to have conducted a study, but was merely seeking inexpensive land. Another has relocated three times, each time seeking larger premises. This is indicative of the short range planning Windsor's wholesalers seem to adhere to when relocating.

#### AGENTS

There is only one food agent in Windsor and he is located in his residence. Location in Windsor could be almost anywhere for this distributor as approximately 99 percent of his sales are outside the city's boundaries. His trade area includes the states of Michigan, New York, Illinois, as well as the provinces of Ontario and Quebec.

This agent has a telephone business and never actually takes physical possession of goods. He needs no storage space and location is relatively unimportant. His location in Windsor can be attributed to

the fact that acting as a food agent is not his prime occupation, but is done merely to supplement his income.

Representing several manufacturers "but getting bigger all the time", this distributor specialized in importing cheese from Italy which he sells to food specialty shops and stores in ethnic neighbourhoods, mostly notably Italian.

Since agents and brokers are primarily engaged in selling or buying merchandise on behalf of others,<sup>111</sup> it could be hypothesized that they would be concentrated in large centrally located metropolitan areas. Although Windsor has many customs brokers due to its location at a border crossing, it is this same location which handicaps food brokers. Detroit, across the river from Windsor, has seventy-one food brokers<sup>112</sup> while Toronto has ninety-one.<sup>113</sup>

The ability of the broker to centralize himself in large metropolitan areas is an indication of the impact that modern transportation and communication has had upon wholesale trade. By telephone, a retail outlet, restaurant or hospital can contact a broker who in turn notifies a supplier and the merchandise is sent by truck, train, or if there is great urgency, it can be transferred by airplane. Goods can be received just as fast and often faster in this manner than if an order were placed through a local distributor.<sup>114</sup> Windsor's lack of food agents is further

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111. Beckman, p. 100.

112. "Yellow Pages", Detroit Telephone Directory, Sept., 1971, p. 628.

113. "Yellow Pages", Toronto Telephone Directory, April, 1971, p. 443-4.

114. From a lecture by Dr. J. Ransome, November 29, 1968.

evidence of the restricted state of the city's wholesale function.

Not to be mistaken with the agent is the customs broker. Windsor has many custom brokers who generally represent clients in the purchase of foreign products. Normally, a single agent represents a number of clients whose imports are too small to justify establishing their own importing staffs.

The customs broker may furnish their clients with market information and perform incidental functions connected with the technique of shipping. However, despite the variety of export and import agency types, their importance is but slight in its percentage<sup>115</sup> of the business reported by all wholesale organizations.

It has been the purpose of this section to analyze the sites and motives for the selection of these sites by Windsor's grocery and confectionary distributors. From this it is observed that they tend to take a casual view of the importance of location and few have conducted any type of location study. Furthermore, of the studies that were completed, none was done by a professional geographer or by a method which he might incorporate. What methods would a professional geographer use in locating a wholesale establishment such as mentioned in this study?

There are several alternative methods at the disposal of the geographer. However, before a search for a location can begin, a sound strategy for the outlet should be determined,

- 1) A decision as to what type of wholesaler a company wants to be.

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115. Beckman states on page 235 that it amounts to about .5% in various Census of Business years for export agencies and varies from .1% to about .6% for import agents.



- 2) A thought-out plan of how the company wants to grow.
- 3) A sound knowledge of the market areas where the company wants to do business.
- 4) A careful, detailed study of alternative store location opportunities, and the risks and rewards which each presents.
- 5) Good timing and flexibility to adjust to changing conditions.<sup>116</sup>

With this strategy completed, the search for a location begins. One of the most widely used methods of analyzing a location is the centre of gravity model. Using this means, maps are plotted showing all potential customers of the proposed wholesaler. A site is selected which places the distributor in a position central to his customers. Two important considerations to which attention must be paid, contingent to a central location are accessibility and real estate. Accessibility being how easily a site can be reached by customers and real estate, including land and building costs and operating costs, i.e., real estate taxes, maintenance and repair.

Accessibility or "easily reached" can be translated to short distances and ease of driving.<sup>117</sup> It can be used in a comparative sense to describe a site that is more easily reached than that of a competitor. Two elements can be examined when evaluating accessibility, road surface conditions and time-distance.<sup>118</sup> Road surface conditions if they are poor,

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116. Guide to Store Location Research ed. C. Kounblau, (Don Mills, 1968) p. 32.

117. Guide to Store Location Research, p. 83.

118. Op. Cit.

i.e., feeder roads that are unpaved, pitted or in some other ways hazardous to driving give poor accessibility to a site. Time-distance, one of the most important considerations considers both the distance and time travelled, i.e., a site may adjoin a major freeway at a clover-leaf and nevertheless have poor accessibility if it is necessary to travel for any distance on a feeder road before the distributor is reached.

The real estate factor, although appearing to include only costs, is important because of its vital link with the original strategies. When considering real estate, the question must be answered is the site selected for its land rent cost or by the long-range strategy and profit potential?

When all of these factors are considered, a site must be centrally located, have accessibility and not only a suitable rent cost but must also fulfil the original strategy with regard to potential.

## CHAPTER VI

TRENDS AND GENERALIZATIONSCONCERNING WHOLESALING IN WINDSOR

Windsor is not as strong a wholesaler as might be expected for the size of its population. National trends in distribution, applicable locally, also have precluded "major growth of wholesaling in Windsor. The most noteworthy of these is the vertical integration of the wholesale function as larger retail stores and manufacturers assume more importance in the distribution of their produce. In Windsor, this is plainly evident when studying wholesale sales. From 1951 to 1961, the amount of wholesale sales and the number employed in distribution did not change significantly while the number of outlets in some areas actually declined. This would serve to emphasize that the local small distributors are declining in importance as the larger chains expand their services to the wholesale field.

The wholesalers of Windsor, like those of other cities, are starting to decentralize, but many are reluctant to leave their established locations in the fear that their customers will not follow them. It seems likely that the trend of slow decentralization to more suburban locations will continue among wholesale distributors in the Windsor area. However, certain wholesalers will remain highly localized in the central city and within a short radius from the downtown center because of the advantages of services and of clustering. Another factor keeping many of these distributors in the central core area which James

Moore<sup>119</sup> of the Windsor Industrial Commission stresses is that they often have a large fixed investment in their present site, and, in order to relocate must be able to sell their existing facilities. Mr. Moore states that the wholesalers presently relocating, want locations south of Tecumseh Road, west of Walker Road and east of Dougall Avenue or an area near the Devonshire Mall and Devon Industrial Park. In these areas they feel they will get more public exposure, less congestion, better facilities, more space for expansion and better accessibility, especially due to the E. C. Row Expressway.

In addition, wholesalers in Windsor are beginning to move to industrial parks, especially to sites near Devon Park and the Tecumseh-Lauzon Road area. The advantages of industrial parks for the wholesaler are numerous and include inexpensive land, freedom from congestion, accessibility, developed utilities and services, room for expansion, and a certain element of prestige afforded by name and landscaping. In the industrial park the wholesaler can often get less expensive land than the manufacturer because the wholesaler does not require sanitary facilities. Mr. Moore stated that there was little competition for land in Windsor between wholesalers and manufacturers because land is in good supply and as was mentioned, wholesalers can use less fully serviced land.

The relocation of wholesalers in Windsor is often forced by the poor planning of available space, the lack of room for expansion and the congestion of the core area. Thus the industrial park and suburban locations are definitely more advantageous. The suburban location permits extensive

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119. From an interview with Mr. James Moore, Director, Windsor Industrial Commission, August 30, 1973.

one-story structures whose amenities are far superior in terms of storage and shipping and parking to the converted hotels of the market area and converted retail outlets of the city core.

Future wholesaling in Windsor will be more closely associated with highway developments and with an eye toward better servicing of large outlying shopping centers. Railroads, in Windsor, as in many urban centers, have been slow in appraising the needs of wholesaling, and should not take a back seat in the movement of goods to transport trucks. Railways could do much for distributors by promoting real estate for wholesaling and assisting in the construction of new facilities. This is also an area where the trucking concerns of Windsor could improve their position and make their terminals the centre of a wholesale complex, but they, like the railways, have been slow in recognizing the potential of such a concept.

Mr. Moore believes that the lot of the Windsor wholesaler is going to improve because as he states, Windsor has been a forgotten segment of the Canadian market due to its location. There has never been full recognition of its market potential, and wholesalers who might have located in Windsor have been "scared off" by distributors in Detroit. This is now changing because of a reluctance of shoppers to go to Detroit, a general tightening of customs at the Windsor-Detroit border, a feeling of national identity which he believes is a factor in "buying Canadian" and the recognition of Windsor's market potential by large national business organizations. This recognition of Windsor's Market has led to several inquiries to his office by large nationwide distributors and the purchase of a small local distributor (McKeough Wholesale Distributors) by one such firm. If more large national distributors should decide to locate in Windsor it could have a significant effect on altering the city's wholesale make-up.

With more competition in the future among the wholesalers, the importance of an optimal site would be essential and more comprehensive methods of finding such a site would be adopted. Also many of the small independent distributors would either be bought out or forced out of business by the larger firms with their more efficient methods and perhaps lower prices.

One factor which would be influential in the development of Windsor's distributors would be the expansion of the city's harbour facilities. However, although the Harbour Commission is assembling parcels of land, there are no plans for expansion of existing facilities, and, in fact, volume over the past few years is down due to the trend towards containerization.

CONCLUSION

This study has described and analyzed the location of wholesaling in Windsor with special emphasis on grocery and confectionary distributors. The study of the wholesale function in Windsor is centered around the question of why Windsor is not the wholesale center one would expect since one of the prime features of wholesale distribution in North America is the heavy concentrations of establishments in the largest cities of highly productive regions. In Windsor, this can be primarily accounted for by the city's inability to centralize regional wholesale establishments within its metropolitan limits, a fact which depends largely on the proximity and size of its competing centers.

Obstructed by an international boundary, Windsor's effective distribution territory is further limited by the proximity of Detroit, London, and Toronto, all of whose distribution areas overshadow Windsor's. Traditionally these factors have always hindered the development of a strong wholesale function in the city. In addition, Windsor does not have the characteristics of other more important wholesale centers in Canada, i.e., Calgary or Winnipeg, which are important centers for collecting, transferring and distributing goods. They also rank as important transportation, finance and business service centers.

Within the city itself, this inability to function as a strong wholesale center is exemplified in the haphazard manner by which the existing wholesalers select their locations. Generally, the wholesalers of Windsor do not conduct location studies. Instead, they tend to locate where they "feel" it is best. Their often cited location motives were greater proximity to customers and market accessibility. In relocating, most distributors also stated they did so because their previous site was in a congested area

and offered no room for expansion. Even the studies that were conducted by the distributors must be questioned by the very nature in which they were conducted. Most were based on assumptions and none was completed by professionals. The major factors which determined how comprehensive a study was to be completed were:

- 1) how much money was to be invested in the new location
- 2) the size and extent of sales outside Windsor

as the distributors with a great percent of their total sales outside the city's limits tended to be more careful in their site selection.

In concluding, national trends towards greater decentralization and the vertical integration of the wholesale function are evident in Windsor, but on a much smaller scale since wholesale trade is not a major contributor to the city's economy. Furthermore, although the character of wholesaling in Windsor is likely to be changed, it is unlikely that the importance of wholesale trade in the city will increase substantially. This is primarily because as trade centers increase in magnitude, they tend to become more specialized in the wholesaling functions with the result that cities like Windsor, located within the trade sphere of larger metropolitan areas are surrendering wholesaling to the better services of larger trade centers. The larger trade centers have been growing at a rate faster than that for Windsor and this fact contributes to their dominance over the smaller trade center.



## APPENDIX A

WHOLESALECONFIDENTIAL ACADEMIC QUESTIONNAIRE

1. In what commodities do you specialize: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
2. The best description of your activity is:
- |                                |       |
|--------------------------------|-------|
| Merchant Wholesaler with Stock | _____ |
| Wholesale Yard                 | _____ |
| Exporter/Importer              | _____ |
| Wholesaler without Stock       | _____ |
| Retail/Wholesaler              | _____ |
3. To whom do you distribute primarily:
- |                                   |       |
|-----------------------------------|-------|
| Retailers                         | _____ |
| Other Wholesalers                 | _____ |
| Institutions (Schools, Hospitals) | _____ |
| Manufacturers                     | _____ |
4. On the enclosed map, please mark approximately the distribution area which would be considered your market area.
5. Approximately what percent of your sales are outside of metropolitan Windsor's boundaries? \_\_\_\_\_

6. a) Is this your first location in Windsor? Yes \_\_\_\_\_  
No \_\_\_\_\_

b) Where were you previously located? \_\_\_\_\_  
\_\_\_\_\_

7. How long have you been located here? \_\_\_\_\_

8. The ownership of this outlet is:

Individual Partnership \_\_\_\_\_

Private Corporation \_\_\_\_\_

Subsidiary Firm \_\_\_\_\_

Public \_\_\_\_\_

Other (Specify) \_\_\_\_\_

9. The building(s) are: Owned \_\_\_\_\_

Leased \_\_\_\_\_

Rented \_\_\_\_\_

10. What is your present square footage?

In Buildings \_\_\_\_\_

In Total Area, including Buildings \_\_\_\_\_

In Separate Commercial Warehousing \_\_\_\_\_

11. What is your approximate rent value? \_\_\_\_\_

12. a) Did you yourself or anyone else conduct a study

on location before you located here to find an

optimal location: Yes \_\_\_\_\_ No \_\_\_\_\_

b) If so when: \_\_\_\_\_

13. Was inexpensive land a reason for your locating where

you presently are: Yes \_\_\_\_\_ No \_\_\_\_\_

14. Was inexpensive rent a reason for your locating where  
you presently are Yes \_\_\_\_\_  
No \_\_\_\_\_
15. Was this location's good access to truck routes a  
reason for your locating here: Yes \_\_\_\_\_  
No \_\_\_\_\_
16. Was adequate truck and customer parking a reason for  
your locating here: Yes \_\_\_\_\_  
No \_\_\_\_\_
17. Was this location's proximity to customers a reason  
for your locating here: Yes \_\_\_\_\_  
No \_\_\_\_\_
18. Was this location's proximity to other wholesalers  
a reason for your selection of this site? Yes \_\_\_\_\_  
No \_\_\_\_\_
19. Did you locate here because of the prestige of having  
central office space: Yes \_\_\_\_\_  
No \_\_\_\_\_
20. Was a reason for your locating here because it was  
suburban space and allowed freedom of movement in  
all directions? Yes \_\_\_\_\_  
No \_\_\_\_\_

21. Of the following statements, which influenced your site selection the most:

Mark in order of preference:

- a) Inexpensive land
- b) Inexpensive rent
- c) Good access to truck routes
- d) Adequate truck and customer parking
- e) Proximity to customers
- f) Prestige of central office space
- g) Suburban space and freedom of movement in all directions
- h) Proximity to other wholesalers

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

22. If this is not your first location in Windsor, why did you relocate:

List a maximum of four (4) in order of importance:

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_

23. a) Are you presently planning to relocate elsewhere in the city? Yes \_\_\_\_\_ No \_\_\_\_\_

b) If so, where do you plan to relocate: \_\_\_\_\_

\_\_\_\_\_

24. Why are you planning to relocate on the site which you have just stated? List a maximum of four (4) in order of importance:

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_

25. Do you pick up goods or are they delivered:

Delivered	_____
Picked up	_____
Both	_____
Percent Picked Up	_____

26. If you deliver, would you please complete the following chart? (See Attached Sheet)

27. Do you use air transport? Yes \_\_\_\_\_ No \_\_\_\_\_

28. How many people do you have employed? Part Time \_\_\_\_\_  
Full Time \_\_\_\_\_

Chart for Question #26.

VEHICLE	NUMBER OF EACH	MILES/ WEEK	OPERATING COST/WEEK
Pick-Up Truck			
Van			
Semi-Transport			
Car			
Station Wagon			
Stake Truck			
Other			

## APPENDIX B

TYPE OF OPERATION DESCRIPTIONS FOR WHOLESALE TRADE

Wholesalers proper is the major type of operation group composed of the seven undermentioned minor groups, the component establishments of which possess one common characteristic -- they buy and sell on their own account. To this common property the establishments concerned add some of all of the following functions:

- a) Buying in bulk and selling in smaller quantities.
- b) Providing delivery service.
- c) Offering warehouse facilities for storage of stocks of merchandise for sale.

Drop shippers or desk jobbers are wholesalers proper who operate from an office and have no facilities for storing stocks of merchandise for sale. They generally locate a buyer before ordering the merchandise from the supplier, who makes the delivery direct to the buyer. Normally they do not have facilities for breaking down bulk purchases into smaller lots.

Export merchants possess all the characteristics of wholesalers proper and, in addition, are distinguishable in that their sales are made to foreign buyers.

Import merchants possess all the characteristics of wholesalers proper and, in addition, are distinguishable in that they sell produce of foreign origin.

Mail order wholesalers possess all the characteristics of wholesalers proper and, in addition, are distinguishable in that they specialize in filling orders received by mail.

Voluntary group wholesalers possess all the characteristics of wholesalers proper and, in addition, are distinguishable in that they are affiliated with a group of retail merchants voluntarily associated for buying purposes.

Wagon distributors possess all the characteristics of wholesalers proper in a peculiar form. They simultaneously combine the selling, delivery and, to some extent, the warehousing functions by soliciting sales from a vehicle containing an assortment and quantity of merchandise sufficient to satisfy the demands of their prospective buyers.

Wholesale merchants possess all the characteristics of wholesalers proper in their most comprehensive sense.

Petroleum bulk tank stations is a major type of operation group composed of the three undermentioned minor groups, the component establishments of which are usually storage tanks, generally located at railway sidings from which petroleum products, chiefly gasoline and oil, are distributed in bulk quantities.

Commission stations are petroleum bulk tank stations owned by the petroleum producing firms and operated for them by commission agents.

Independent stations are petroleum bulk tank stations buying and selling on own account and owned and operated independently of the petroleum producing firms.



Salary stations are petroleum bulk tank stations owned and operated by the petroleum producing firms.


Assemblers of primary products is the major type of operation group composed of the four under-mentioned groups, the component establishments of which have a common distinguishable feature -- they purchase direct the products of the primary agricultural, forestry and fishing and trapping industries for subsequent marketing, either on own account or commission basis. Producers of primary products are not included in the census.

Buyers of primary products are assemblers whose characteristics do not fit any of the assembler classifications shown below.

Co-operative selling organizations are assemblers co-operatively owned by the producers of primary products. Local co-operative marketing associations, as well as co-operative central sales agencies, are included, however co-operatively owned grain elevators are included in the following category.

Grain elevators are assemblers of grain. The large majority of the establishments included are country elevators located in the Prairie Provinces and owned by the large grain and milling firms. As in 1941, terminal elevators are not included in the census, also the value of purchases or cash payments to farmers is taken as the volume of business.

Packers and shippers are assemblers engaged in selling primary products after having packed them. Establishments where packing only is done, without selling are not included in the census.



Manufacturers' sales branches and offices is a major type of operation group composed of the three undermentioned minor groups, the component establishments of which have one common characteristic -- they are owned and operated by manufacturing firms.

District or general sales offices are offices from which the sales program for part or all of the firm is supervised and accounting is usually done. Generally, local sales are made and, very often, all large sales are transacted from these offices.

Manufacturers' sales branches (without stocks) are branches where no stocks of merchandise for sale are carried, but orders are taken and shipments are made direct from factory to buyer. Invoicing is sometimes done in these branches.

Manufacturers' sales branches (with stocks) are branches where stocks of merchandise for sale are carried and delivery service is available. Invoicing and accounting are often done in these branches.

Agents and brokers are a type of operation composed of the eight undermentioned minor groups, the component establishments of which have one common characteristic -- they are in business for themselves but they sell, on a commission basis, products owned by others.

Auction companies are companies that, on their own premises display and auction the merchandise owned by others.

Brokers assist their principals in trading by bringing buyer and seller together and providing pertinent market information. While they do negotiate sales and purchases they do not physically handle the merchandise involved, nor do they prepare the necessary

invoices. They are not free to set prices or decide terms of sale. They do not maintain continuous business relations with any particular client.

Commission merchants handle and store merchandise they trade in, generally do the invoicing and make deliveries to customers. They are free to arrange sales at the most advantageous prices and they often extend credit at their own risk. As a rule the commission merchants' business relation with their principals are not continuous.

Export agents and brokers are agents and brokers, (as described elsewhere on this page) who trade in foreign markets.

Import agents and brokers are agents and brokers, (as described elsewhere on this page) who sell in Canada, products from foreign countries.

Manufacturers' agents maintain continuous business relations with one or more manufacturers. Their principals control them with respect to price, terms of sale and trading area. Manufacturers' agents sell only part of their principals' output.

Purchasing agents and resident buyers make purchases for one or more principals with whom they maintain continuous business relations. They often supply their principals with pertinent market information.

Selling agents sell the entire output of a given line of goods owned by one or more principals. They have considerable freedom with respect to price, terms of sale and trading area. They have been known to finance their principals and often handle their sales promotion program.

Other types of operation is a residual group intended to accommodate business establishments which cannot be assigned to any of the foregoing classifications. The group includes distributing warehouses which combine the functions of storage and distribution of merchandise. Brewers' warehouses and agencies and government owned companies are included in this classification.

## APPENDIX C

## VOLUME VI (Part 2) -- WHOLESALE TRADE: SERVICES

Location Statistics: Wholesale Trade

- Canada and the provinces, 1961 (6.2-1). - Statistics by kind of business and type of operation. Limited comparisons with 1951.
- Counties and incorporated centres of 5,000 population and over, 1961. - Limited comparisons with 1951.
- Size of business (6.2-3). Size by annual sales, by employment, by ownership.

Establishment Statistics: Wholesale Trade

- General statistics (6.2-4). Including detail on employment, gross trading margin and the major categories of operating expenses.
- Analysis of sales (6.2-5). Sales distributed by type of buyer and commodity lines; information about vending machines.
- Introduction to wholesale section of Volume VI (Part 2) (6.2-6). Textual and tabular introductory materials.

Location Statistics: Service Trades

- Provinces and cities by kind of business, 1961, (5.2-7). Limited comparisons with 1951.
- Counties and incorporated centres of 1,000 population and over, 1961 (6.2-8). Limited comparisons with 1951.
- Size of business (6.2-9) - Size by annual receipts, by employment, by ownership.
- Miscellaneous data (6.2-10). Form of organization, type of occupancy, sales of meals and lunches, merchandise sales through vending machines.

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