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UNITED STATES DEPARTMENT OF COMMERCE

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BUREAU OF THE CENSUS

J. C. CAPT, Director (Appointed May 22, 1941)

WILLIAM LANE AUSTIN, Director (Retired January 31, 1941)

VERGIL D. REED, Assistant Director

HOWARD H. McCLURE, Assistant Director



SIXTEENTH CENSUS OF THE UNITED STATES: 1940

CENSUS OF BUSINESS

VOLUME V

DISTRIBUTION OF  
MANUFACTURERS' SALES  
1939

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Library*

Prepared under the supervision of

FRED A. GOSNELL

Chief Statistician for Business

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## REPORTS ON BUSINESS

### CENSUS OF BUSINESS: 1939

Volume I. Retail Trade (in three parts).

Volume II. Wholesale Trade.

Volume III. Service Businesses.

Volume IV. Construction.

Volume V. Distribution of Manufacturers' Sales.

Special Reports.

## LETTER OF TRANSMITTAL

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DEPARTMENT OF COMMERCE,  
BUREAU OF THE CENSUS,  
*Washington, D. C., September 10, 1942.*

SIR: I transmit herewith volume V of the Sixteenth Census reports on the Census of Business. This volume presents information on sales channels used by manufacturers in disposing of their products from plants. Data are given in summary for the United States for 402 industry classifications.

The Census of Business, taken in 1940 in conformity with the Act providing for the Fifteenth and subsequent decennial censuses, approved June 18, 1929, covers operations during the calendar year 1939. The facts in this report were collected in 1940, as a part of the Census of Manufactures, by a complete field canvass of all manufacturing establishments in continental United States.

The statistics were compiled under the supervision of Fred A. Gosnell, Chief Statistician for Business, and William A. Ruff, Assistant Chief Statistician. This volume was prepared by James T. Daly under the direction of John Albright, Chief of Wholesale Trade.

Respectfully,

J. C. CAPT,  
*Director of the Census.*

HON. JESSE H. JONES,  
*Secretary of Commerce.*

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Aircraft and parts, including aircraft engines.....	19	188	189	190	190	191	191	Boots and shoes, rubber (including rubber-soled footwear with fabric uppers).....	11	112	113	113	114	114	115
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Aluminum products (including rolling and drawing and extruding) not elsewhere classified.....	15	154	155	157	158	159	160	Brick and hollow structural tile.....	13	127	128	130	131	132	133
Aluminum ware (kitchen, hospital, and household), except electrical appliances.....	15	154	155	157	158	159	160	Brooms.....	20	197	198	200	202	203	204
Ammunition.....	9	96	97	99	101	102	103	Brushes.....	20	197	198	200	202	203	204
Artificial leather and oilcloth.....	3	46	47	49	50	51	52	Butter, creamery.....	1	18	20	23	25	27	28
Artists' materials.....	20	196	198	199	201	203	204	Buttons.....	20	196	198	199	201	203	204
Asbestos products (except steam packing and pipe and boiler covering).....	13	127	128	130	131	132	133	Candles.....	9	96	97	99	101	102	103
Automobile stampings.....	14	139	141	143	145	147	148	Candy and other confectionery products.....	1	18	20	22	25	27	28
Automobile trailers (for attachment to passenger cars).....	18	184	184	185	185	185	186	Canned and dried fruits and vegetables (including canned soups).....	1	18	20	22	25	26	28
Automotive electrical equipment.....	16	164	165	166	167	168	169	Canned fish, crustacea, and mollusks.....	1	18	20	22	25	26	28
Baking powder, yeast, and other leavening compounds.....	1	19	21	24	26	27	28	Canvas products (except bags).....	4	58	59	62	63	66	67
Baskets for fruits and vegetables.....	6	77	78	79	80	81	82	Carbon paper and inked ribbons.....	20	196	198	199	201	203	204
Batteries, storage and primary (dry and wet).....	16	164	165	166	167	168	169	Carbon products for the electrical industry, and manufactures of carbon or artificial graphite.....	16	164	165	166	167	168	169
Batting, padding, and wadding; and upholstery filling.....	3	46	47	49	50	51	52	Carpets and rugs, wool.....	3	46	47	48	50	51	52
Beauty-shop and barber-shop equipment.....	20	197	198	200	202	203	204	Carpets, rugs, and mats (made from materials such as paper fiber, grass, jute, flax, sisal, cotton, cocoon fiber, and rags).....	3	46	47	48	50	51	52
Bechive coke.....	10	107	107	108	108	109	100	Carpet yarn—woolen and worsted.....	3	46	47	48	50	51	52
Belts (apparel), regardless of material.....	4	58	59	61	63	65	67	Cars and car equipment—railroad, street, and rapid-transit.....	19	174	175	178	180	181	182
Beverages, nonalcoholic.....	1	18	20	22	25	26	28	Cars and trucks (industrial and mining).....	17	174	175	178	180	181	182
Biscuit, crackers, and pretzels.....	1	18	20	22	25	26	28	Caskets, coffins, burial cases, and other morticians' goods.....	6	77	78	79	80	81	82
Blast-furnace products.....	14	139	140	142	144	146	148	Cast-iron pipe and fittings.....	14	139	141	143	145	146	148
Blended and prepared flour made from purchased flour.....	1	19	20	25	27	28	28	Cement.....	13	127	128	129	131	132	133
Blowers, and exhaust and ventilating fans.....	17	174	176	178	180	181	181	Cereal preparations.....	1	19	20	23	25	27	28
Bluing.....	0	96	97	99	101	102	103	Cheese.....	1	18	20	23	25	27	28
Boatbuilding and boat repairing.....	10	190	190	190	190	190	190	Chemicals not elsewhere classified.....	9	96	97	99	101	102	103
Bolts, nuts, washers, and rivets made in plants not operated in connection with rolling mills.....	14	139	141	143	145	147	148	Chewing gum.....	1	18	20	22	25	27	28

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Children's and infants' wear not elsewhere classified	4	Page 57	Page 59	Page 61	Page 63	Page 65	Page 67	Fertilizers	9	Page 95	Page 97	Page 98	Page 100	Page 102	Page 103
Children's vehicles	20	197	198	200	202	203	204	Fiber cans, tubes, and similar products	7	86	86	87	88	88	89
China firing and decorating (for the trade)	13	127	128	129	131	132	133	Films	14	130	140	142	144	146	148
Chocolate and cocoa products	1	18	20	22	25	27	28	Finishing of men's and boys' hats of fur felt, wool felt, and straw	3	46	47	48	50	51	52
Cigar boxes (wooden or part wooden)	6	77	78	79	80	81	82	Fire extinguishers, chemical	20	197	198	200	202	203	204
Cigarettes	2	31	31	32	32	33	33	Firearms	14	140	141	143	145	147	148
Cigars	2	31	31	32	32	33	33	Fireworks	9	96	97	99	101	102	103
Clay products (except pottery) not elsewhere classified	13	127	128	130	131	132	133	Fish and other marine oils, cake, and meal	9	95	97	98	100	102	103
Clay refractories, including refractory cement (clay)	13	127	128	130	131	132	133	Flavoring extracts and flavoring sirups, not elsewhere classified	1	10	21	24	26	27	28
Cleaning and polishing preparations, blackings, and dressings	9	96	97	99	101	102	103	Food preparations, not elsewhere classified	1	10	21	24	26	27	28
Clocks, watches, and materials and parts (except watchcases)	15	154	155	156	158	159	160	Food-products machinery	17	175	176	179	180	181	181
Cloth sponging and miscellaneous special finishing	3	38	39	40	41	42	42	Floor and wall tile (except quarry tile)	13	127	128	130	131	132	133
Clothing (leather and sheep-lined)	4	58	59	61	63	66	67	Flour and other grain-mill products	1	10	20	23	25	27	28
Coal-tar products (crude and intermediate)	9	96	97	99	101	102	103	Footwear (except rubber)	12	119	119	120	121	121	122
Coated and glazed paper	7	86	86	87	88	88	89	Forgings (iron and steel) made in plants not operated in connection with rolling mills	14	140	141	143	145	147	148
Coats, suits, and skirts (except fur coats)	4	58	59	61	63	66	67	Fuel briquets	10	107	107	108	108	109	100
Cold-rolled steel sheets and strip and cold-finished steel bars made in plants not operated in connection with hot-rolling mills	14	140	141	141	145	147	148	Fur coats and other fur garments, accessories, and trimmings	4	57	59	60	63	65	67
Collapsible tubes	15	154	155	157	158	159	160	Furniture, household, except upholstered	9	77	78	79	80	81	82
Colors and pigments	9	96	97	99	101	102	103	Furniture, household, upholstered	9	77	78	79	80	81	82
Commercial laundry, dry-cleaning, and pressing machines	17	175	176	176	179	180	181	Furniture, laboratory, hospital, and other professional	9	77	78	79	80	81	82
Communication equipment	10	104	105	106	107	108	109	Furniture, office	9	77	78	79	80	81	82
Compressed and liquefied gases not made in petroleum refineries or in natural-gasoline plants	9	96	97	99	101	102	103	Furniture, public-building	9	77	78	79	80	81	82
Concrete products	13	127	128	129	131	132	133	Furs (dressed and dyed)	20	197	198	200	202	203	204
Condensed and evaporated milk	1	18	20	23	25	27	28	Galvanizing and other coating carried on in plants not operated in connection with rolling mills	14	130	141	145	147	148	148
Construction and similar machinery (except mining and oil-field machinery and tools)	17	174	170	177	178	180	181	Games and toys (except dolls and children's vehicles)	20	197	198	200	202	203	204
Converted paper products not elsewhere classified	7	80	80	87	88	88	89	Generating, distribution, and industrial apparatus, and apparatus for incorporation in manufactured products, not elsewhere classified	16	164	165	166	167	168	169
Cooking and other edible fats and oils, not elsewhere classified	1	19	21	24	26	27	28	Glass containers	13	127	128	129	131	132	133
Cooperage	6	77	78	79	80	81	82	Glass, flat	13	127	128	129	131	132	133
Cordage and twine	3	46	47	49	50	51	52	Glass (pressed or blown), tableware, and glassware not elsewhere classified	13	127	128	129	131	132	133
Cork products	6	77	78	79	80	81	82	Gloves and mittens, dress and semidress—cloth, cloth and leather combined	4	58	59	62	63	66	67
Corn sirup, corn sugar, corn oil, and starch	1	19	21	24	26	27	28	Gloves and mittens, leather	12	119	119	120	121	121	122
Corsets and allied garments	4	58	59	61	63	65	67	Glove and gelatin	9	95	97	99	101	102	103
Costume jewelry and costume novelties (jewelry other than fine jewelry)	20	198	198	199	201	203	204	Gold and silver leaf and foil	15	154	155	157	158	159	160
Cotton broad woven goods	3	37	38	40	41	42	42	Graphite, natural (ground and refined)	13	127	128	130	131	132	133
Cotton narrow fabrics	3	37	38	40	41	42	42	Gray-iron and semisteel castings	14	139	141	143	145	146	148
Cottonseed oil, cake, meal, and linters	9	95	97	98	100	102	103	Grease and tallow (except lubricating greases)	9	95	97	99	101	102	103
Cotton thread	3	37	39	40	41	42	42	Gum naval stores (processing but not gathering or warehousing)	9	95	97	98	101	102	103
Cotton yarn	3	37	38	40	41	42	42	Gypsum products	13	127	128	129	131	132	133
Cured fish	1	18	20	22	25	26	28	Hair work	20	197	198	200	202	203	204
Curtains, draperies, and bedspreads	4	58	59	62	63	66	67	Handkerchiefs	4	58	59	62	63	66	67
Custom slaughtering, wholesale	1	19	20	23	25	27	28	Hand stamps, stenella, and brands	20	198	198	199	201	203	204
Cutlery (except aluminum, silver, and plated cutlery) and edge tools	14	139	140	142	144	146	148	Hardware not elsewhere classified	14	139	140	142	144	146	148
Dairy products, special	1	18	20	25	27	28	28	Hardwood distillation and charcoal manufacture	9	95	97	98	101	102	103
Dental equipment and supplies	20	197	198	200	201	203	204	Hat and cap materials; trimmings, etc.	4	57	59	63	65	67	67
Die-cut paper and paperboard, and converted cardboard	7	80	80	87	88	88	89	Hat bodies and hats, fur-felt	3	46	47	48	50	51	52
Dolls (except rubber)	20	197	198	200	202	203	204	Hat bodies and hats, wool-felt	3	46	47	48	50	51	52
Doors, window sash, frames, molding, and trim (metal)	14	139	140	142	144	146	148	Hats, straw	3	46	47	48	50	51	52
Drugs and medicines (including drug grinding)	9	95	97	98	100	102	103	Hatters' fur	3	46	47	48	50	51	52
Dyeing and finishing—cotton, rayon, silk, and linen textiles	3	38	39	40	41	42	42	Heating and cooking apparatus (except electric) not elsewhere classified	14	139	141	142	145	146	148
Dyeing and finishing—woolen and worsted	3	38	39	40	41	42	42	Hosiery—full-fashioned	3	46	47	48	50	51	52
Electric lamps	16	164	165	166	167	168	169	Hosiery—seamless	3	46	47	48	50	51	52
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Electrical measuring instruments	16	164	165	166	167	168	169	House dresses, uniforms, and aprons	4	58	59	61	63	66	67
Electrical products not elsewhere classified	16	164	165	166	167	168	169	Houseshirtings (except curtains, draperies, and bedspreads)	4	58	59	62	63	66	67
Electroplating, plating, and polishing	15	154	155	156	158	159	160	Ice cream and fees	1	18	20	23	25	27	28
Elevators, escalators, and conveyors	17	174	170	177	178	180	181	Ice, manufactured	1	18	20	23	25	27	28
Embroideries—other than Schiffli-machine products	4	58	59	62	63	66	67	Industrial leather bolting and packing leather	12	119	119	120	121	121	122
Embroideries—Schiffli-machine products	4	58	59	62	63	66	67	Industrial machinery not elsewhere classified	17	175	176	177	179	180	181
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Engraving on metal (except for printing purposes)	15	154	155	156	158	159	160	Ink, writing	9	95	97	100	101	102	103
Envelopes	7	80	80	87	88	88	89	Insecticides, fungicides, and related industrial and household chemical compounds	9	95	97	98	100	102	103
Essential oils	9	95	97	98	100	102	103	Instruments, professional and scientific (except surgical and dental)	20	197	198	199	201	203	204
Excelsior	6	77	78	79	80	81	82	Instruments, surgical and medical	20	197	198	199	201	203	204
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								Jute goods (except felt)	3	46	47	49	50	51	52
								Knitted cloth	3	46	47	48	50	51	52
								Knitted gloves	3	46	47	48	50	51	52
								Knitted underwear (except knit gloves)	3	46	47	48	50	51	52
								Knitted underwear	3	46	47	48	50	51	52
								Lease goods	3	46	47	49	50	51	52
								Lamp shades	20	198	198	199	201	203	204
								Lapidary work	15	154	155	156	158	159	160
								Lasts and related products	6	77	78	79	80	81	82

## TABLES AND ALPHABETICAL INDEX TO INDUSTRIES—Continued

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Leather (tanned, curried, and finished)—regular factories or jobbers engaging contractors.....	12	110	110	120	121	121	122	Pencils (except mechanical) and crayons.....	20	190	198	199	201	203	204
Lighting fixtures.....	15	154	155	156	158	159	160	Pens, mechanical pencils, and pen points.....	20	190	198	199	201	203	204
Lime.....	13	127	128	129	131	132	133	Perfumes, cosmetics, and other toilet preparations.....	9	95	97	98	100	102	103
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Linooleum; and asphalted-felt-base and other hard-surface floor coverings not elsewhere classified.....	3	46	47	48	50	51	52	Photographic apparatus and materials and projection equipment (except lenses).....	20	197	198	199	201	203	204
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Liquors, distilled.....	1	18	20	22	25	26	28	Pianos.....	20	197	198	199	201	203	204
Liquors, malt.....	1	18	20	22	25	26	28	Pickled fruits and vegetables and vegetable sauces and seasonings.....	1	18	20	22	25	27	28
Liquors, rectified or blended.....	1	18	20	22	25	26	28	Planing mills not operated in conjunction with sawmills.....	5	69	70	70	71	71	72
Locomotives (including frames) and parts (railroad, mining, and industrial).....	19	190	190	190	190	190	190	Plastic materials.....	9	95	97	98	101	102	103
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Lubricating oils and greases not made in petroleum refineries.....	9	96	97	99	101	102	103	Porcelain electrical supplies.....	13	127	128	129	131	132	133
Macaroni, spaghetti, vermicelli, and noodles.....	1	19	21	24	26	27	28	Pottery products not elsewhere classified.....	13	127	128	129	131	132	133
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Machine-shop products not elsewhere classified.....	17	175	176	177	179	180	181	Power boilers and associated products.....	14	139	141	142	145	146	148
Machine-shop repairs.....	17	175	176	177	179	180	181	Prepared feeds (including mineral) for animals and fowls.....	1	19	20	23	25	27	28
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Malleable-iron castings.....	14	130	141	143	145	146	148	Printing-trades machinery and equipment.....	17	175	176	177	179	180	181
Malt.....	1	18	20	22	25	26	28	Processed waste and recovered wool fibers.....	3	46	47	49	50	51	52
Matches.....	6	77	78	79	80	81	82	Pulp goods (pressed and molded).....	7	86	86	87	88	88	89
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# DISTRIBUTION OF MANUFACTURERS' SALES: 1939

## INTRODUCTION

This report presents statistics on the sales channels used by manufacturers in disposing of their products during 1939. It presents information, by industries, on the initial flow of goods from plants to users and consumers, showing the amounts sold (1) to or through manufacturers' own wholesale branches or offices, (2) to or through their own retail outlets, (3) to industrial, commercial, professional, and institutional users, (4) to wholesalers and jobbers, (5) to export intermediaries, (6) to retailers for resale, (7) to buyers in other countries (direct exports), and (8) to consumers at retail. For the textile trades sales to converters are also set forth separately. In addition to the amount of sales made to these various classes of customers, the proportion of sales negotiated through agents, brokers, and commission houses is shown separately. Comparisons are made with 1935 and 1929, the only years for which similar data are available.

**Area and period covered.**—Distribution of sales data were collected in connection with the Census of Manufactures but they are compiled and published as a part of the Census of Business. Statistics for 1939 were obtained in 1940 in a complete field canvass of all manufacturing plants in the continental United States, conducted by the regular Field Division of the Bureau of the Census. They cover operations during the calendar year 1939, or in some cases the fiscal year ended nearest December 31, 1939.

**Classification of industries (Census of Manufactures).**—Each manufacturing establishment (see definition of "establishment," p. 2) is assigned to one industry classification on the basis of its principal product or group of products. Although there are thousands of more or less distinct lines of manufacturing activities, all manufacturing establishments have been classified, for purposes of the 1939 census, into 446 industries. It should be noted that there has been considerable expansion in the number of industry classifications as set forth by the Census of Manufactures. In 1929 there were 326, and in the 1935 census 337, compared with the present (1939) 446 separate industry classifications.

**The schedule.**—Statistics for distribution of sales were secured on a special schedule attached to the 1939 Census of Manufactures questionnaire. The schedule used was the same for all industries, with the exception of cotton, silk, and rayon manufactures and dyeing and finishing of textiles other than woolen and worsted. Facsimiles of these schedules will be found on pages 205 and 206.

It is interesting to note that three additional sales channels were included for the first time on the 1939 questionnaire. These channels are "sales to export intermediaries" (included with wholesalers and jobbers in 1935 and 1929), and "export sales made direct to buyers in other countries" (included with sales not allocated to usual channels in 1935), and "sales to converters" (for cotton, silk, and rayon manufactures only).

**Industries for which no 1939 distribution of sales statistics were collected.**—For census purposes, manufacturing activities are divided into 446 industry classifications which are telescoped into 20 major industry groups. Statistics in this volume cover the distribution for 402 of the 446 industries. Distribution of sales statistics were not collected for (1) printing, publishing, and allied industries; (2) for industries where the plants were engaged primarily in performing labor on materials owned by others so that their sales represented the sales of services rather than commodities; and (3) for industries where no sales were made, the plants being maintained for the purpose of making repairs. The industries not covered are as follows:

### Textile-mill Products and Other Fiber Manufactures:

- Knitted outerwear (except knit gloves)—contract factories.
- Processed waste and recovered wool fibers—contract factories.
- Rayon broad woven goods—contract factories.
- Rayon throwing and spinning—contract factories.
- Silk broad woven goods—contract factories.
- Silk throwing and spinning—contract factories.
- Woolen and worsted manufactures—contract factories.

### Apparel and Other Finished Products made from Fabrics and Similar Materials:

- Children's and infants' coats—contract factories.
- Children's and infants' dresses, including house coats and sportswear (middies, slacks, beach wear, etc.)—contract factories.
- Children's and infants' wear not elsewhere classified—contract factories.
- Coats, suits, and skirts (except fur coats)—contract factories.
- Curtains, draperies, and bedspreads—contract factories.
- Embroideries, other than Schiffli-machine products—contract factories.
- Handkerchiefs—contract factories.
- House dresses, uniforms, and aprons—contract factories.
- Men's and boys' shirts (except work shirts), collars, and nightwear—contract factories.
- Men's and boys' suits, coats, and overcoats (except work clothing)—contract factories.
- Men's and boys' underwear—contract factories.
- Men's neckwear—contract factories.

Trimmings (not made in textile mills), stamped art goods, and art needlework—contract factories.

Women's and misses' blouses and waists—contract factories.

Women's and misses' clothing not elsewhere classified—contract factories.

Women's and misses' dresses (except house dresses)—contract factories.

**Printing, Publishing, and Allied Industries:**

Bookbinding and related industries.

Books—printing without publishing.

Books—publishing and printing.

Books—publishing without printing.

Electrotyping and stereotyping, not done in printing establishments.

Engraving (steel, copperplate, and wood); plate printing.

General commercial (job) printing.

Gravure, rotogravure, and rotary photogravure (including preparation of plates).

Greeting cards (except hand-painted).

Lithographing and photo-lithographing (including preparation of stones or plates and dry transfers).

Machine and hand typesetting (including advertisement typesetting).

Newspapers—publishing and printing.

Newspapers—publishing without printing.

Periodicals—publishing and printing.

Periodicals—publishing without printing.

Photoengraving, not done in printing establishments (including preparation of plates).

**Machinery (Except Electrical):**

Machine shop repairs.

**Transportation Equipment (Except Automobiles):**

Boatbuilding and boat repairing.

Cars and car equipment—railroad, street, and rapid-transit.

Locomotives (including frames) and parts—railroad, mining, and industrial.

Shipbuilding and ship repairing.

**Correlation with Census of Manufactures.**—Total distributed sales, as given in this report, may differ from value of products as shown in the Census of Manufactures for several reasons: (1) Receipts for contract and repair work are included in value of products but not in sales; (2) sales are affected by changes in inventory of finished goods between the beginning and end of year; (3) in some instances sales were reported on the basis of selling (delivered) price rather than f. o. b. factory value; (4) some plants in the various industries purchase and sell goods which they do not process, goods that are included in distributed sales but not in value of products; (5) interplant transfers (not considered as distributed sales for purposes of this study) are included in value of products but not in distributed sales; and (6) value of products was reported for all plants but a few respondents were unable to analyze their sales by classes of customers. Reconciliation with Census of Manufactures is considered in table 5.

**Description of tables.**—The facts derived from this study are presented, by industries, within major groups, in six tables, as follows:

*Table 1* presents information, for the year 1939, on sales to the various classes of customers, both in terms of dollar amounts and as a percentage of total distributed sales. For convenience in comparing with data published for the Census of Manufactures, the number of plants for which sales analyses were obtained is also given.

*Table 2.* In this table, which also presents information for 1939 only, some of the channels have been combined to show (a) sales handled by manufacturers through their own distribution facilities operated apart from plants; (b) sales to trading concerns (wholesale or retail) in the United States; (c) direct export business; (d) sales to industrial users—goods bought for business use but not for resale in the same form in which purchased; and (e) sales to consumers at retail. Interplant transfers, not considered as a part of distributed sales, are measured in this table.

*Table 3* presents comparative information covering sales by classes of customers, by industries, for 1939, 1935, and 1929 wherever possible. Those industries for which no comparable information is available have been omitted from table 3.

*Table 4* presents 1939 information, by industries, on the number of establishments using the various channels of distribution and the number using a given channel exclusively.

*Table 5* is a reconciliation table in which distributed sales are compared with value of products as shown by the Census of Manufactures. In making the reconciliation, consideration is given to changes in inventories of finished goods between the beginning and end of the year, merchandise purchased and sold without processing, receipts for contract and repair work, interplant transfers, and undistributed sales. The number of establishments reporting sales analyses is also compared with the total number shown in the Census of Manufactures.

*Table 6* presents information by industries on the volume of sales negotiated through agents, brokers, and commission houses (including direct export business), and number of establishments reporting such sales, 1939 and 1935. For comparative purposes, direct export sales have been omitted from the 1939 distributed sales.

**Revision of 1935 and 1929 data.**—Where a possibility of misinterpretation of the information furnished by manufacturers was encountered, or where radical shifts in channels were noted (between 1939 and 1935 reports), respondents were contacted for verification of the information submitted. In some instances, this led to corrections in the 1939 data and also to some revisions in 1935 and 1929. Where the revisions in 1935 and 1929 were of major importance, corrections were made and are identified as such in this report.

## EXPLANATION OF TERMS

**Establishment.**—The term "establishment," as defined by the Census of Manufactures, signifies a single plant or factory. Occasionally, however, a single plant may be counted as two or more establishments where separate reports were obtained for different lines of activities (assigned to different industry classifications) carried on in the same plant. In previous censuses, one return was considered as representing one establishment, although in some instances one report may have covered two or more plants operated under the same management, if located in the same city or in the same county but in different municipalities or unincorporated places having fewer than 10,000 inhabitants.

In 1939, however, the number of establishments was based primarily upon the respondents' answers to the question "How many plants does this report cover?" This change does not materially affect the number of establishments in any specific industry. No data were collected from establishments or plants with products valued at less than \$5,000.

**Distributed sales.**—The amounts reported represent the total sales of plants for which a class-of-customer analysis was submitted, and are for the most part based upon the f. o. b. factory value of all goods sold during the year 1939. In a few instances sales were reported on the basis of "delivered" value rather than f. o. b. factory. Merchandise purchased by manufacturers for sale without further processing is included.

Distributed sales include all commodities manufactured within the plants of a given industry and may therefore include the sale of secondary products normally classified under other industries (see "Classification of industries," p. 1). On the other hand, distributed sales may not represent the value of all products normally belonging to an industry. The value of these secondary products may be obtained by reference to Census of Manufactures reports.

**Interplant transfers.**—Interplant transfers, as interpreted for purposes of this study (not considered distributed sales), are actual physical transfers, within multiunit organizations only, of products from one plant to another plant for the purpose of further processing, or of finished products made in one plant but used as materials, supplies, or containers for products in the manufacturing activity of another plant in the same organization. The amounts shown represent the transfer values obtained from companies' records where available. Estimated market values (including delivery costs to plants consuming these products) were accepted where no book values were assigned.

**Sales to or through own wholesale branches or offices.**—Respondents were instructed to report here all goods transferred from plants to sales branches for sale, and also all sales of goods delivered from plants to customers on orders (bookings) through the companies' sales branches or offices—but not on orders received through central or administrative offices. Sales branches, as defined for purposes of the Census of Business, are wholesale outlets owned and operated by manufacturers, apart from plants, primarily for purposes of selling their products. Provision is made at these branches for storing and handling the merchandise. Sales offices are similar to sales branches except that no provision is made for storing, handling, and delivering merchandise. Data for manufacturers' sales offices and branches are presented in the Wholesale Census.

**Sales to or through own retail stores.**—The amounts reported include all sales or transfers of goods by manufacturing plants to their own retail outlets. In some

instances, particularly in the food group, sales to retail outlets located on the same premises as the manufacturing plant may be included. Manufacturers' retail stores are included in the Retail Census.

**Sales to wholesalers and jobbers** include all sales invoiced to wholesale establishments (other than manufacturer-owned-and-operated wholesale sales branches or offices) for resale. Included in this category are industrial distributors, drop shippers or desk jobbers, voluntary group wholesalers, and retailer co-operative warehouses, as well as wholesale merchants.

**Converters (textile)** are merchant middlemen in the textile trade who purchase textiles in the gray from manufacturers, have them dyed and finished in plants usually operated on a contract or commission basis, and then sell them to wholesalers or large-scale retailers.

**Sales to export intermediaries** include sales to establishments in the United States primarily engaged in selling goods for export. Products invoiced at the plant for direct export to buyers in other countries are not included but are shown as direct export sales.

**Sales to retailers for resale** include sales to chains, mail-order houses, department stores, and independent retailers. Sales to retail outlets owned and operated by manufacturers are not included here.

**Sales to industrial, commercial, professional, and institutional users** include sales to concerns which purchase goods for business purposes or for use in production but which do not as a rule sell the goods in substantially the same form in which they are purchased. Sales to manufacturers, railroads, public utilities, transportation companies (air transport, bus, and taxi), mine and quarry operators, oil producers, pipe line and refineries, governmental bodies, hotels, contractors, institutions (such as hospitals, clubs, schools, etc.), and other large users are included. Respondents were instructed to report here supplies and equipment (such as cash registers, delivery wagons, refrigeration apparatus, soda fountains, showcases, etc.) sold to wholesalers and retailers for use in their business.

**Sales to consumers at retail** represent direct sales from manufacturing plants to individual household consumers and sales of manufacturing establishments to their own employees at retail. Sales to farmers are also included. These sales are restricted for the most part to consumer goods.

**Export sales** include sales of goods invoiced by plants to buyers or receivers in other countries who do not maintain established places of business in the United States. Sales to companies' own foreign branches are also included here. Sales to exporters or export agencies located in the United States are included with sales to export intermediaries.

**Sales through agents, brokers, and commission houses.**—Amounts included here are intended to show what portion of the total distributed sales going to the

various primary channels was negotiated through agents, brokers, and commission houses (not including sales made through manufacturers' own sales forces). This classification includes manufacturers' agents, brokers, selling agents, and other commission agents who are in business for themselves.

***Purchased merchandise sold without processing.***—The amounts included represent purchases made by manufacturers for sale without further processing. Such products usually consist of allied or related goods to be sold in conjunction with those manufactured and are usually purchased by the manufacturer to satisfy the needs of his customers. Merchandise purchased by manufacturers and shown as cost of materials or supplies in the Census of Manufactures reports is not included here.

***Inventory.***—The amounts shown represent the value of physical inventories of finished goods for the beginning and end of the year 1939 (including goods produced by contract work on materials owned). Respondents

were instructed to include only those inventories held at manufacturing plants.

***Value of products,*** as defined by the Census of Manufactures, represents the selling value at the factory or plant, of all commodities produced, and in some industries receipts for work done (contract and repair work), during the census year, whether sold, transferred to other plants within the same organization (interplant transfers), or in stock. Consequently, under normal conditions, the total value of products covers the cost of production, overhead expenses, and profits. Selling expenses are also included except where separate sales departments are operated, in which case the values at which the products are turned over to sales departments are reported.

***Receipts for contract and repair work*** represent amounts received by manufacturers for work done on materials owned by others. Amounts received for such contract or repair work are included in value of products but not in distributed sales.