

In the present as in the past, Canadian manufacturing production has been chiefly dependent upon the use of Canadian raw material, though this is less true than formerly. Raw cotton, for example, is imported from the Southern States, hides from the Argentine, rubber from the Straits Settlements and Malay Peninsula, sugar from Cuba and the British West Indies, and wool from Australia and New Zealand, to supply the raw material for Canadian manufacturing industries.

2.—Statistics of Manufactures.

1.—Growth since 1871.

The growth of large-scale production in manufactures during the past fifty years is evident from the statistics of Table 1, though this tendency has been less marked in Canada than in more highly developed industrial communities, with larger populations able to absorb a larger amount of standardized commodities. Even so, in the electoral district of South Toronto, the most important manufacturing centre of Ontario, the census of 1911 showed that one-half of the industrial establishments employed 90 p.c. of the workers. In the period immediately preceding the Great War many consolidations of previously independent manufacturing plants were effected, involving large economies in the purchase of materials and in selling expenses.

The historical Table 1 shows fairly well the advance of the "Industrial Revolution" (which might better be called Evolution) in Canada. The average capital per manufacturing establishment, the average number of employees per establishment, and the average value of product per establishment, have been in trend continuously on the increase. If the consolidation of industry lessens the chances of an employee becoming a master, it must also be remembered that the amounts paid to employees in salaries and wages have also increased, so that the position of the average employee has been greatly ameliorated, though the lack of statistics on Canadian prices before 1890 prevents us from comparing the purchasing power of the average wages of the worker in 1870 and of the employee of 1920 and 1921.

The Censuses of Manufactures.—The comparability of the statistics of the various censuses is seriously affected by the different methods employed in taking the census. In the censuses of 1870, 1880 and 1890, all manufacturing establishments were included, the instructions to enumerators running as follows:—"An industrial establishment is a place where one or several persons are employed in manufacturing, altering, making up or changing from one shape into another, materials for sale, use or consumption, quite irrespectively of the amount of capital employed or of the products turned out. All repairs, mending or custom work are understood to be industrial products and are to be entered accordingly, by value, in the returns of industrial establishments."

In the statistics for 1900, 1905, and 1910, however, only establishments employing five hands and upwards were included. The 1901 instructions are that no manufacturing establishment or factory will be so recognized for census purposes which does not employ at least five persons, either in the establishment itself or as pieceworkers employed out of it. This, however, did not apply to cheese and butter factories nor to certain mineral products. The 1911 instructions stated that every factory in operation during the whole or part of 1910, and employing five or more persons, was to make a full report. All flour mills, saw and shingle mills, lime kilns brick and tile works, butter and cheese factories, fish curing plants, electric light and power plants whatsoever were nevertheless to be included. The statistics for 1915 included only establishments having an output of \$2,500 or over, irrespective of the