

include a general review of the principal mineral industries, such as the copper-gold, silver-lead-zinc and nickel-copper industries, as well as a section on metallurgical works. The additional data include such features as capital employed, numbers of employees, wages and salaries paid, and gross and net production. The aim has been to extend the mining statistics beyond a summary of the production of individual minerals by approaching the subject from the standpoint of industrial organization, definitely illustrating the place which mining holds in the scheme of Canadian productive enterprise.

The net value of the products of the mines, smelters, quarries, sand and gravel pits, oil and gas wells, clay products plants, cement mills and other mineral industries should not be confused with the figures given as the value of mineral production. The values produced by the metallic industries given in Tables 6 and 7 are those reported by the operating companies, and are in each case the settlements received for shipments by mine operators and the additional value obtained when the smelting of these ores is completed in Canada. The totals indicate more nearly the actual return to the different industries than do the values for the several metals in Table 2 of this chapter, where, in the cases of copper, lead, zinc and silver, the values are computed by using the average prices for the year in the principal metal markets. Furthermore, the production figures of Table 2 include all quantities shipped from the mines, while metals absorbed in new metallurgical operations or remaining in stock at smelters and refineries are not included in the industrial figures of Tables 6 and 7. On the other hand, some imported ores and concentrates are treated in Canadian non-ferrous smelting and refining works. The net value of the products of these plants includes, therefore, the net value of the metals recovered from these imported ores and to this extent the net sales shown in Tables 6 and 7 include products not of Canadian origin. Furthermore, the value of gold production is computed at the standard rate of \$20·671834 per fine oz. (Table 9), while the actual return to the industries includes the premiums on gold as well. For these reasons the industrial returns differ from the total of production and, while occasionally smaller as in 1930, are usually larger as in 1931.

The total net value of products of the fuel industries in Table 7 is less than the total production of fuels in Table 2, because the net value of products of the industries is confined to that for which the operators receive some economic return, while the production of the fuel commodities includes all of those commodities produced, whether the producer actually receives payment in any form for them or not. Thus in coal mining, the industrial values in Table 7 include only coal sold, supplied to employees for domestic consumption, or used in making coke and briquettes, whereas the figures of coal production as shown in Table 2 include, in addition to the above, coal consumed for power and other purposes in the coal-mining operations and also the difference between coal put on the bank and lifted from the bank. Petroleum producers have a larger monetary return than the actual value of the petroleum produced because many oil wells also produce large quantities of natural gas. On the other hand, the natural gas industry receives a smaller return than the total value of all natural gas produced because some of the gas is produced by the petroleum industry, because of leakage or other loss in piping gas to the consumers, and because a small amount of natural gas is produced by private individuals or groups from their own wells for their own consumption, without any industrial organization intervening between producer and consumer.