

The fruit and vegetable preparations industry which includes canned fruits, canned vegetables, pickles, vinegar, jams, etc., comprises another large division of this group. In 1930, this industry reported an output valued at \$43,093,752, a capital investment of \$46,135,025 and an employment of 10,651 persons who received \$5,634,355 in salaries and wages. The development of the canned foods trade has affected great changes in the relation of foods to seasons. Fruits and vegetables of many kinds are to be had at all times of the year with much of their original freshness and flavour. The producers in the country are provided with an enormously extended market and the consumers in both city and country with cheap and wholesome food in great variety. The industry has made rapid strides in the past few years. During the period of 1923-30 the volume of fruit and vegetable preparations produced increased 149.0 p.c. This growth is indeed remarkable as it represents a corresponding increase in the domestic demand for these products, the foreign trade being relatively small as compared with the domestic production. Imports in 1930 were valued at \$6,819,532 and exports at \$2,706,661. According to these figures, the industry supplies about 92 p.c. of the domestic requirements.

The sugar-refining industry is also of substantial importance. The demands created by the War gave it a great impetus. All things considered 1919 was a record year. The number of persons employed (3,491), the value added by manufacture (\$16,321,882) and the exports (\$22,953,135) were the highest recorded while the volume of sugar manufactured was only 10 p.c. lower than that of the peak year 1925 when 11,714,967 cwt. was produced. Since 1925, however, exports of sugar have declined with the result that production and employment slackened considerably. In 1930, the 8 sugar refineries reported a capital investment of \$43,855,155 and a value of production of \$42,935,722. They also employed 2,281 persons who received \$3,560,260 in salaries and wages, and paid out \$30,610,701 for materials. Exports of sugar in 1930 amounted to 218,150 cwt. valued at \$1,025,073.

The beverages industry—breweries, distilleries and wineries—which are important elements of the vegetable products group, have expanded from a production of \$30,000,000 in 1922 to \$87,000,000 in 1930, owing partly to the modification of prohibition laws in Canada and also to the fact that a large part of their production is exported directly or indirectly to the United States. The tobacco industry, another important factor in the vegetable products group, had a total production in 1930 of nearly \$86,000,000 and a payroll of 8,905 persons who received \$7,837,711 in salaries and wages.

Animal Products.—Production in this group is determined, in large measure, by the demand at home and abroad for Canadian butter, cheese, canned fish, fresh or frozen meats, bacon and hams, condensed and evaporated milk, etc.

The leading industry of the group is that of slaughtering and meat packing, with a value of production in 1930 of \$164,029,953. Next comes butter and cheese with a value of \$113,018,789. These two industries produced about two-thirds of the production of the entire group.

The butter and cheese industry, which manufactures a product of farm animals, has been for many years of leading importance in Canada. Originating in the agricultural districts of the Maritime Provinces, the Eastern Townships of Quebec, and the southern counties of Ontario, it is now developing rapidly in the Prairie Provinces and in the more recent northern settlements of Quebec and Ontario. For an industry so large in the aggregate, it is unique in having shown very little tendency