

capital investment of \$37,286,824 and an employment of 6,530 persons, who received \$3,842,575 in salaries and wages. The development of the canned foods trade has effected 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 1923-33 the volume of fruit and vegetable preparations produced increased 100·4 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 1933 were valued at \$2,112,299 and exports at \$3,606,698. According to these figures, the industry besides supplying the domestic requirements also has a small exportable surplus.

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 1933, the 8 sugar refineries reported a capital investment of \$35,758,074 and a value of production of \$37,189,960. They also employed 2,092 persons who received \$3,048,817 in salaries and wages, and paid out \$22,846,473 for materials. Exports of sugar in 1933 amounted to 179,944 cwt. valued at \$843,613.

The beverage 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 \$44,000,000 in 1933, owing partly to the modification of prohibition laws in Canada and also to the fact that a large part of their production was exported directly or indirectly to the United States. The manufactured tobacco industry, another important factor in the vegetable products group, had a total production in 1933 of about \$37,000,000 and a payroll of 8,241 persons, who received \$6,752,159 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 1933 of \$92,366,137. Next comes butter and cheese, with a value of \$80,395,887. These two industries represented 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 toward consolidation in large units, the gross production of \$80,395,887 coming from no fewer than 2,693 plants, mostly small and scattered at convenient points throughout the farming communities.