

Imports and exports of manufactured tobacco are small. The industry normally absorbs about three-quarters of the tobacco crop of Canada, although a proportion of imported raw leaf is used for blending.

Other important industries of this group are: biscuits and confectionery, brewing, distilling, and sugar refineries. With regard to this last industry, refineries situated on the Atlantic and Pacific coasts use imported raw cane sugars, while others in Western Ontario and Alberta manufacture beet sugar. The production of the latter is shown in the Agriculture chapter, p. 227.

Animal Products.—The industries of this group process the products of agricultural live stock, of the fisheries, and of fur-bearing animals.

Slaughtering and Meat Packing.—The products of this, the leading industry of the group, besides supplying the home market, constitute an important element in exports, especially bacon and hams. The growth of the industry from a production valued at \$3,800,000 in 1870, and \$7,100,000 in 1890, to that of to-day has been accompanied by a concentration of the major part of the production into a comparatively small number of large establishments, thereby facilitating greater efficiency of operation and the utilization of by-products such as fertilizers, glue, and canned meats and soups. There has been a large increase in the number of establishments since 1931, due to the inclusion of wholesale butchers operating small plants engaged in slaughtering only. The inclusion of these small establishments did not affect materially the value of production of the industry. The numbers of live stock slaughtered at Canadian inspected establishments are shown in the Internal Trade Chapter (see Index).

Butter and Cheese.—This industry has been for many years of leading importance in Canada. It originated in the mixed-farming and dairying districts of Eastern Canada, and about the beginning of the century there were large exports of butter and cheese. However, with the increase of population accompanying the expansion of grain growing on the prairies, exports of these products declined. Since the War there has been a tendency for mixed farming and dairying to spread in certain districts of the West and in some years there has been a considerable export movement of butter again. Cheese production has declined since the War, but a large proportion of the production is still exported. Further information regarding the dairy industries appears in the Agriculture chapter (see Index).

Leather Tanneries, and Boots and Shoes.—The tanning industry has long been established on a considerable scale, mainly, of course, because the large numbers of cattle raised and slaughtered provide a ready supply of hides. The industry is now so well developed that there is an export surplus of tanned leather. The boot and shoe industry almost completely supplies the home market in standard lines, the small import surplus being largely confined to expensive shoes. The tanning industry is chiefly centred in Ontario, while more than half the production of boots and shoes comes from Quebec.

Fish Curing and Packing.—This industry occupies an important place in relation to the fisheries of Canada. A considerable proportion of the annual catch is exported to foreign markets in cured and canned forms. Further information regarding the industry appears in the Fisheries chapter, especially at pp. 304 to 306.

Textile Products.—The industries of this group have developed from the household spinning and weaving of the early settlers. They now supply the bulk of the requirements of domestic consumption (see Table 5, p. 386). The import balance under this heading consists largely of either raw materials or fine goods which cannot