

and cheese were exported. However, with the increase of population and expansion of grain growing on the prairies, exports of these products declined. Since the War of 1914-18 there has been a tendency for mixed farming and dairying to spread in certain districts of the West and in certain years a considerable export movement of butter has again occurred. Cheese production has declined since the War of 1914-18, but a large proportion of the production is still exported. Further information regarding the dairy industries appears in the Agriculture chapter at pp. 216 to 220.

*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 centred chiefly in Ontario, but more than half the total boots and shoes are manufactured in the Province of 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. 293 to 295.

**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. 404). The import balance under this heading consists largely of either raw materials or fine goods that cannot be competitively manufactured in Canada. Two important raw materials consumed by branches of industry in this group—namely, raw cotton and raw silk—are entirely imported. The industries of this group are developed chiefly in the eastern provinces, where the factors of climate, cheap power, available labour forces, and accessibility of raw materials are favourable to large-scale growth.

In net production, i.e., in value added by manufacture, which is a truer criterion than gross production of the place of the group in the industrial life of the country, the textile group was fifth in 1937 among the nine major groups shown in the summary statistics of Table 3, p. 401, being exceeded by the wood and paper, iron and its products, vegetable, and non-ferrous metal products groups. Textiles accounted for about 12 p.c. of the net manufacturing production of Canada. As an indication of the contribution that the textile group made in 1937 to employment in the Dominion, the group stood third in the number of employees and third in salaries and wages paid, with about 18·4 p.c. of the total employees in manufacturing and 14·5 p.c. of the total salaries and wages paid. (See Table 19, p. 437.) The manufacture of textiles may be regarded under two general divisions: (1) the spinning, weaving, and knitting trades, and (2) the finishing trades. In the past, the second division, which consists principally of the making up of piece goods into articles of clothing, has been the larger, but in recent years there has been a tendency for the first or primary division to equal or exceed the second in value of production.