

Non-Ferrous Metals.—Two industries classified under this group have shown outstanding development in the period since the War of 1914-18.

Non-Ferrous Metal Smelting and Refining.—This industry now ranks first in gross value of products and second in net value. An important factor in its rapid growth has been the discovery and development of a number of large deposits of base metal ores in Canada, while the availability of low-cost electric power has been another factor in its expansion. This latter factor accounts very largely for the establishment of one large plant on the Saguenay where imported aluminium ore is smelted into bars and other forms of pure metal for export. The products of the whole industry now constitute an important element of the export trade.

Electrical Apparatus and Supplies.—The total horse-power installed in central electric stations in Canada has increased from 1,900,000 in 1919 to 7,477,000 in 1938, while the production in kilowatt hours has increased in the same period from 5,500,000,000 to 26,154,000,000 (see Table 6, *Water Powers* chapter, p. 369). Accompanying this growth of production there has been a very widespread extension of the use of electricity for industrial, commercial, and domestic purposes. A large market has therefore developed in Canada for a wide variety of electrical equipment from the largest generators down to household appliances, and a very large industry (eighth among the industries of Canada in 1937, as shown in Table 12) has grown up to supply that market.

Non-Metallic Mineral Products.—About half the total production of this group is accounted for by the petroleum-refining industry.

Petroleum Products.—The petroleum-refining industry has grown to its present size with the increased use of motor vehicles. In the past the crude petroleum has been largely imported and the refineries were located where such imports were economically available either by water or pipe-line transportation. Developments in the Turner Valley are providing a large supply of crude petroleum in Canada.

Coke and Gas Products.—This industry, being chiefly the production of domestic heating and illuminating gas, has not shown striking expansion, being affected by the competition of low-cost electricity. However, most of the main centres of population are provided with gas services. Production in 1921, valued at \$33,000,000, compares with a production valued at \$42,000,000 for 1937.

Other important industries included in the non-metallic mineral group are: glass products, abrasives, cement, and clay products. The two last-mentioned industries, which in recent years have been below normal production owing to the low level of activity in construction and building, showed some improvement in 1937. The manufacture of artificial abrasives is well developed in Canada because of the advantage of low-cost electric power and a considerable part of the product of the industry is exported.

Chemicals and Allied Products.—Industries of this group are widely developed in Canada. Production attained a very high level during the War of 1914-18. However, since those war industries disappeared there has been a very real growth for ordinary commercial and industrial purposes. Volume of production under this group was higher in 1937 than in any other year since 1923 (Table 6).